FaciliWorks®

Desktop CMMS User Guide

CyberMetrics®

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Chapter One:
Introduction and Implementation Planning

Welcome to FaciliWorks

Welcome to **FaciliWorks Desktop CMMS**, computerized maintenance management software that is an easy-to-use, flexible system for scheduling, managing and tracking your maintenance tasks. This guide is intended to be used by supervisors and network administrators who will be responsible for leading the implementation of FaciliWorks. You'll learn how to set up users, security and user-defined program settings and perform advanced system maintenance features, including backing up and restoring data and importing data from other CMMS systems. This guide is also for general users and will present detailed information about entering records into FaciliWorks and using the various reports and graphs. For basic instructions and time-saving tips that will help you use FaciliWorks more efficiently, please see **Program Conventions**.

A Note about the Software & Technical Support

FaciliWorks is simply a tool used to store data, calculate results and generate printed reports and graphs. The software cannot determine the suitability of the system for your use. Determining this is the responsibility of the user alone. The technical support available for FaciliWorks is strictly limited to the operation of the software itself. If you have questions regarding maintenance frequency, procedures, tools, etc., please seek the advice of your asset manufacturer or other qualified professionals.

Validating the Software

This software has been tested, validated and deemed suitable for release. Calculation validations were conducted using test data with known results. However, these validation tests do not preclude your conducting your own validation tests using data with known results (i.e., results that you calculated manually or proven published values).

It is important to remember that, when comparing the software results to your manually calculated results, you may find that differences exist due to rounding errors. FaciliWorks uses up to 15 significant digits of precision in all intermediate calculations; to give the most precise information, only the final results are rounded.

Training

Each FaciliWorks user should have a thorough understanding of the particular functions that he or she will use. It's not necessary for a user to learn FaciliWorks' tools and utilities if that user isn't going to have administrator rights. Keep in mind that some users may need training on basic computer and Windows functions.

CyberMetrics offers convenient and effective training options to fit your needs. Our talented instructors will guide you through the planning, preparation, setup and successful operation of FaciliWorks. You'll learn how to save time, avoid common mistakes and get the most out of your software.

For more information about FaciliWorks training classes, please call CyberMetrics at 480-295-3465 or toll-free at 1-800-776-3090 or visit us online at www.cybermetrics.com.

FaciliWorks Implementation Planning

As with any new record control system, be it computerized or manual, it is worthwhile to take the time to plan the implementation.

Major steps to consider:

- Define your needs for the system.
- Determine when you want to start using FaciliWorks; set both long-term and short-term goals.
- Choose system administrator(s).

Define Your Needs

The first step is to define what your needs are for your maintenance system and then determine how FaciliWorks can help you meet those needs. For example, you may need the system to:

- Maintain an inventory of all assets, tools and parts.
- Remind you when PM tasks are due.
- Maintain a complete history of all asset and repair records.
- Maintain a history of tool usage.
- Maintain a database of your maintenance procedures.
- Maintain a database of your asset suppliers and service providers.

Define a Time Line

Divide your list of needs into short-term and long-term needs (goals). Next, decide on a time frame for your short-term goals and begin working toward them. This will help you make FaciliWorks useful in the shortest possible time.

Short-term Needs

Short-term needs might include:

- Entering records for only active assets (items that are currently used or may be used in the near future).
- Entering only the most recent history of maintenance records.
- Setting up an internal asset identification numbering scheme (if you don't currently use one).

Before you begin entering your asset records, you should organize your data and formulate a plan for consistent data entry.

You may wish to categorize assets by type so that you can later quickly generate reports by type. You can also generate reports by asset description, so you may want to enter some common information for each kind of asset.

Or you may find it useful to devise an asset identification scheme that includes the type of asset. For example, an Asset ID that begins with a V indicates that the asset is a vehicle, T indicates a truck, HVAC indicates a facility or P1 indicates Plant 1.

Your Asset ID might also include the area where the asset is used, the cost center to which it belongs, the department responsible for it or any other useful information that would help you instantly identify it.

Next, begin working to satisfy your long-term needs.

Long-term Needs

Long-term needs might include:

- Entering your compete inventory of assets (active, inactive and perhaps employee-owned items).
- Entering the complete history of maintenance records (perhaps going as far back as five years).
- Setting up maintenance procedures for on-line reference and control.
- Reviewing maintenance history and optimizing frequencies or scheduling methods (i.e., calendar-based versus meter-based schedules).
- Entering information about your asset and service suppliers.

Choose System Administrator(s)

To choose system administrator(s) (the person or group of people responsible for the system), answer these questions:

- Who will be responsible for the system?
- Who will install the program?
- Who will enter the records?
- Who will maintain and back up the data files?
- Who will take inventory?

Once you answer these questions, you can decide who should lead your FaciliWorks implementation.

Data-building Strategy

Before you begin entering data into FaciliWorks, you must develop a data-building strategy.

Asset Records

FaciliWorks allows an asset record to represent any item of value to your business, such as a vehicle, facility, building, pump or piece of equipment.

A pump and all of its components could be included in a single asset record or the pump itself, motor, starter, etc. could each have its own asset record.

To determine which approach is best for your company, consider the following:

- Does each component need a separate history?
- Does each component need a separate part list?
- Are the components critical or expensive?

If so, you'll want to enter the pump and its components as separate asset records.

If you're going to manually enter your asset records, you should examine the order in which you process them. By using FaciliWorks' **Clone** function, you can save considerable time and avoid mistakes.

In a typical manufacturing environment, though many assets are used, there may only be a few different types of assets. The only differences between similar assets will be each one's ID number, serial number and location. They might also share the same maintenance tasks and procedures. If this is the case for your company, you can set up a boilerplate record of each asset type and then clone the boilerplate record when you add a new asset of the same type.

If you are responsible for centrally managing the records of several facilities (which may amount to thousands of asset records), then you might want to use multiple databases (to avoid waiting too long for records to process and for reports to generate).

Maintenance Tasks

Your data-building strategy should also include how you are going to handle maintenance tasks.

Should you create stand-alone or cumulative tasks for multiple frequencies, such as semiannual and annual tasks?

Does the annual task include the maintenance procedures of the semiannual task or should you create both orders when they coincide once a year?

Data Collection

To begin entering your asset inventory into FaciliWorks, you'll need to either collect your existing records (such as paper files, cards, etc.) or create new records from scratch. If you're switching from another computer-based maintenance system, you may be able to import your records to FaciliWorks. FaciliWorks can import records from the application's standard Excel-based templates. These templates can be obtained from the installation of the DTU program on the same CD as your FaciliWorks software.

If your records are in a system that uses a proprietary file format, you may still be able to import your records by "printing" a report to a file or writing a software program to extract the records. CyberMetrics can be contracted to assist you with the import and record conversion process.

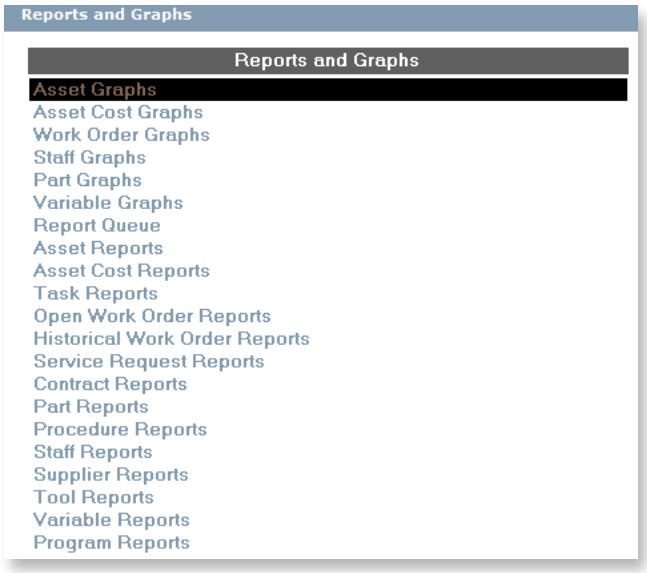
If you are unable to import records from another computer system and must manually enter your records from hard copy records, you can take this opportunity to carefully review your records for completeness and correctness. Questions that you need to answer include:

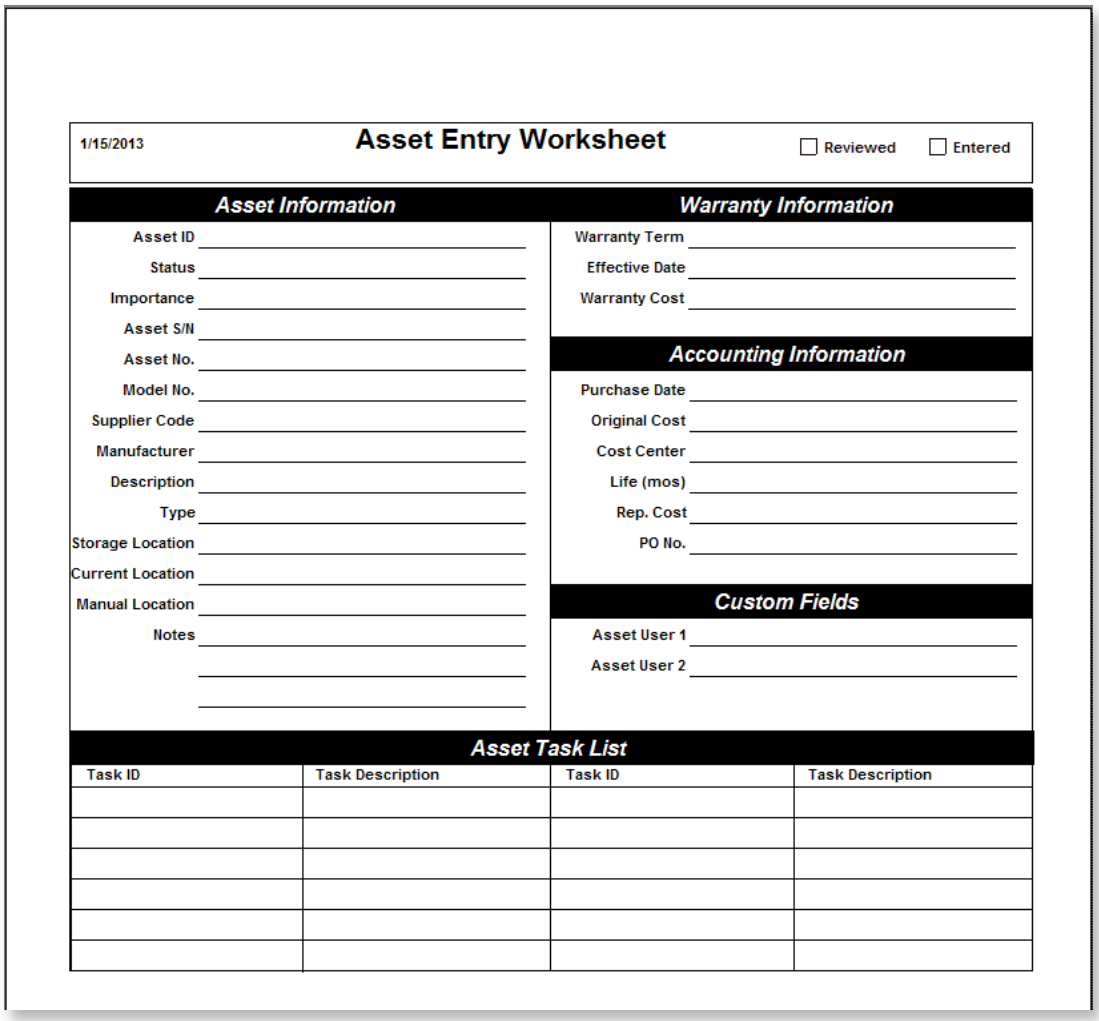
- Where is the existing information?
- How accurate is the data?
- Are walk-downs necessary to collect asset information?
- Should walk-downs cover all assets or only assets that lack complete, accurate information?
- Is the asset still located where it was when the original records were created?

Instruct the data collection person or team on exactly what data to collect and enter. This eliminates the need to look at a record more than once.

FaciliWorks includes printable data collection worksheets that will allow you to compile organized, complete records to enter into FaciliWorks.

To print these blank forms, navigate to **Reports and Graphs -> Program Reports** and select the form you would like to print.





1/15/2013

Asset Entry Worksheet

☐ Reviewed ☐ Entered

Asset Information

Asset ID _____
Status _____
Importance _____
Asset S/N _____
Asset No. _____
Model No. _____
Supplier Code _____
Manufacturer _____
Description _____
Type _____
Storage Location _____
Current Location _____
Manual Location _____
Notes _____

Warranty Information

Warranty Term _____
Effective Date _____
Warranty Cost _____

Accounting Information

Purchase Date _____
Original Cost _____
Cost Center _____
Life (mos) _____
Rep. Cost _____
PO No. _____

Custom Fields

Asset User 1 _____
Asset User 2 _____

Asset Task List

Task ID	Task Description	Task ID	Task Description

The worksheet can be printed or exported as various file types.

Chapter Two:
Running FaciliWorks

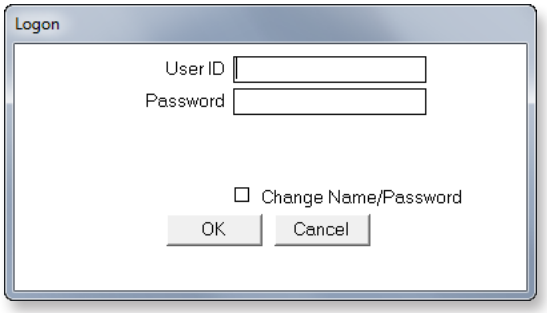
Now that you have installed FaciliWorks, it's time to launch the application.

Starting FaciliWorks

To launch FaciliWorks, double-click the FaciliWorks Desktop icon on your computer desktop.

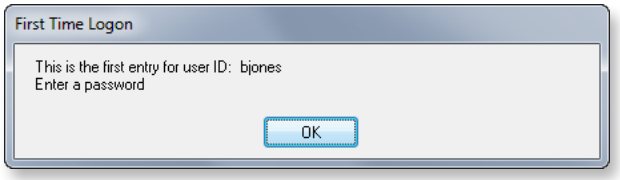
Logon

If your system administrator has set up system security in FaciliWorks, the **Logon** window will appear when you start FaciliWorks:

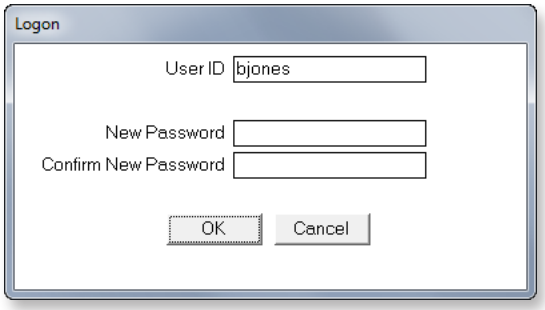


Enter your User ID and Password, and then click **OK**.

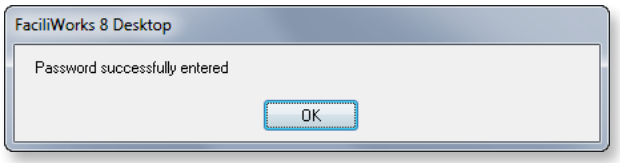
If a password was not previously set, you will see the **First Time Logon** window the first time you log in, prompting you to enter a password:



Click **OK** and the **Logon** window will now appear as follows:



Type your **User ID** and then type a password in the **New Password** field. Type the same password in the **Confirm Password** field and then click **OK**.

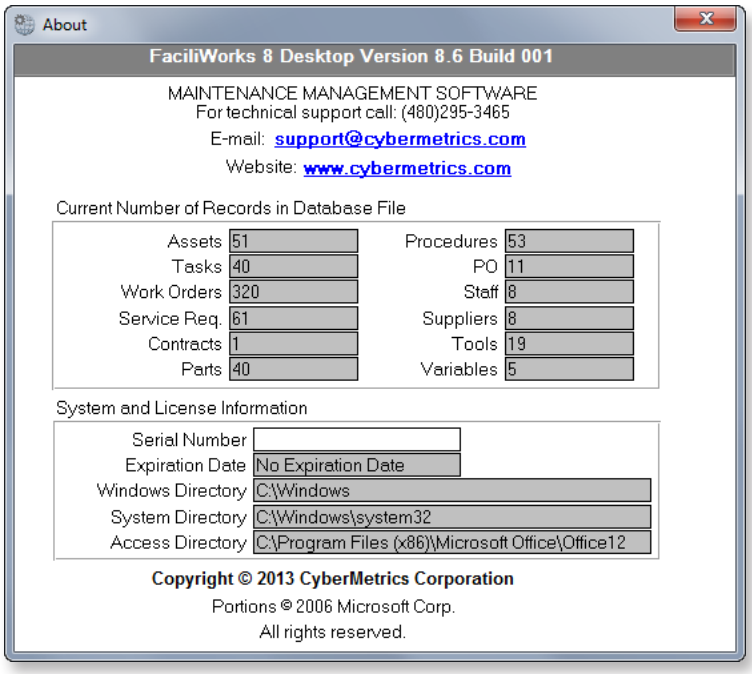


FaciliWorks will require you to enter this password the next time you log in.

To change your password, check the checkbox labeled **Change Name/Password** located in the original **Logon** window. FaciliWorks will require you to enter your old password and then type and confirm your new password.

Serial Number

A reminder message will appear whenever you open FaciliWorks if you have not entered your program serial number into the **About** window. In this reminder message, click **OK** and the **About** window will appear:



In the **Serial Number** field of this form, enter the serial number for your copy of FaciliWorks.

The serial number is located on the inside of the CD case. If you can't find your serial number, please contact Technical Support at 1-800-776-3090.

Data Transfer Utility (DTU)

Upgrading to Desktop 8

If you've upgraded from FaciliWorks version 7 to FaciliWorks version 8, you will need to run the **Data Transfer Utility** (DTU) before you begin using the program with your database. FaciliWorks Desktop 8 will install on your computer in the following location: C:\ProgramFiles\FW80\.

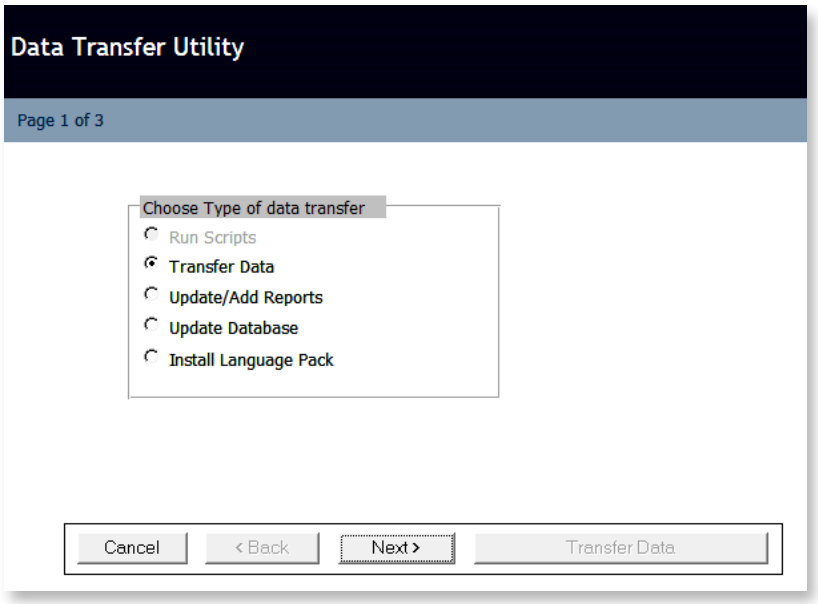
In this folder, you will find two databases:

- FWSample80.accdb (contains sample records)
- FWData80.accdb (blank database)

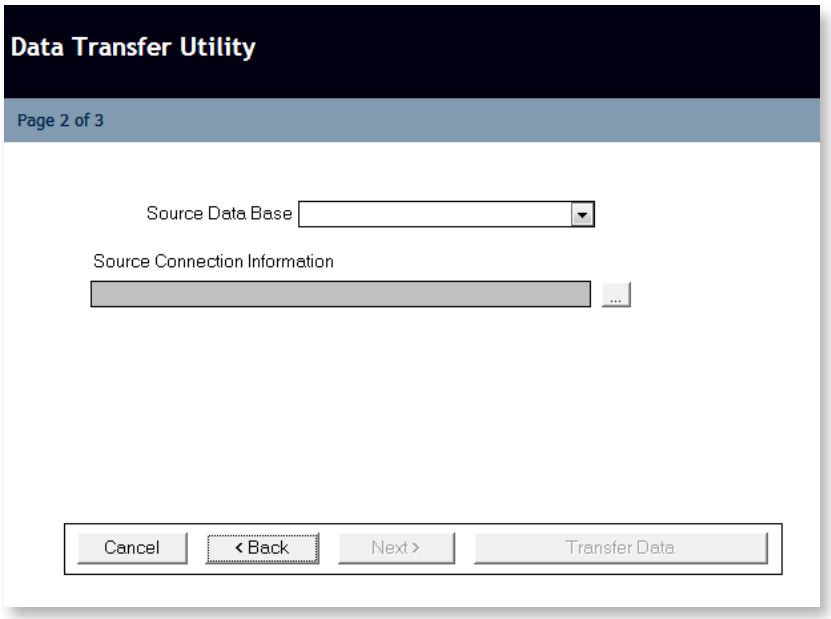
FaciliWorks 7 is built on the Access 2003 platform; the extension of that database is .mdb. FaciliWorks 8 is built on the Access 2007 platform; the extension of that database is .accdb. If you do not transfer your database and update it to the new version, you will encounter errors that you did not have previously. You will transfer your updated FW7 database to the blank database FWData80.accdb.

To complete the data transfer process, make a copy of your database and then follow these steps:

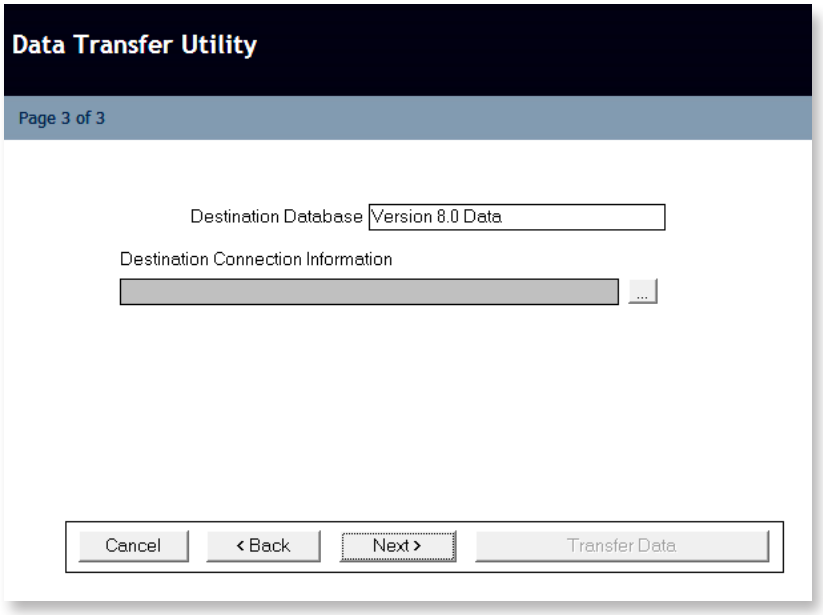
From the Start menu, launch the DTU for FaciliWorks 8 by clicking **Start ->All Programs -> FaciliWorks 8 -> Data Transfer Utility**.



Click the **Transfer Data** radio button and then click **Next**; the following window is now active:

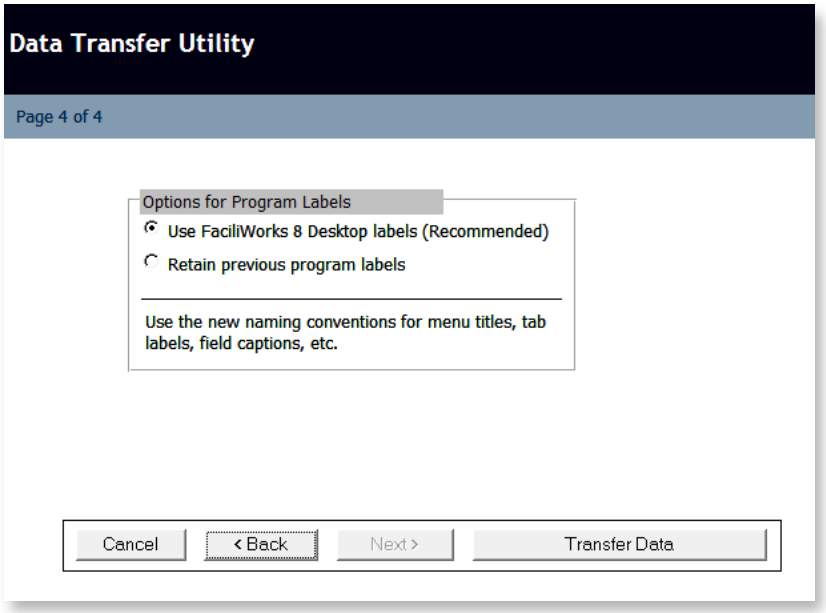


Use the drop-down list in the **Source Database** field to select **Version 7.0 Data**. Click the browse button **[...]** to the right of the **Source Connection Information** field to navigate to and select your database and then click **Next**; the following window is now active:



The **Destination Database** field defaults to **Version 8 Data**. Click the browse button **[...]** to the right of the **Destination Connection Information** field to navigate to and select the blank database in the FW80 folder on your C drive and then click **Next**.

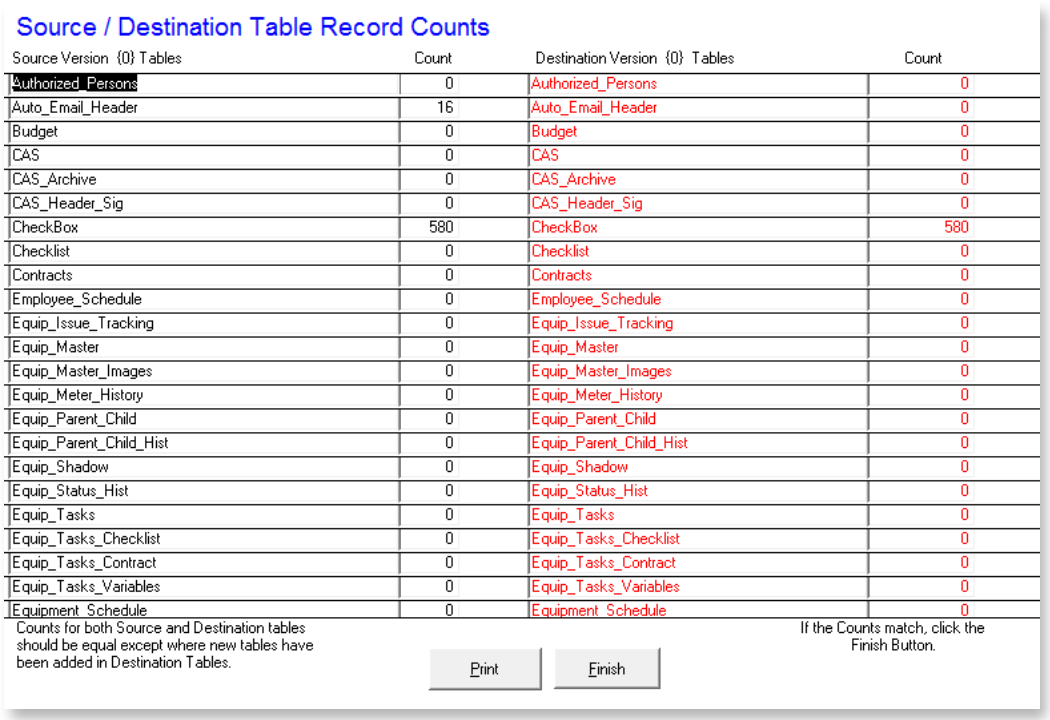
You are now given a choice to use the new labels that are included in FW8, or to retain previous labels from your FW7 database:


Data Transfer Utility
Page 4 of 4
Options for Program Labels
Use FaciliWorks 8 Desktop labels (Recommended)
Retain previous program labels
Use the new naming conventions for menu titles, tab labels, field captions, etc.
Cancel
< Back
Next >
Transfer Data

When you are ready, click **Transfer Data**.

A message reminds you that any data in the blank database will be overwritten. You have already made a copy of your existing database. Click **OK**.

It will take a minute or two for FaciliWorks to transfer the data. The progress of the transfer will be displayed in the status bar at the bottom of the form. When the DTU completes successfully, click **OK**. A listing of table record counts for the transfer will display:



Source / Destination Table Record Counts

Source Version {0} Tables	Count	Destination Version {0} Tables	Count
Authorized_Persons	0	Authorized_Persons	0
Auto_Email_Header	16	Auto_Email_Header	0
Budget	0	Budget	0
CAS	0	CAS	0
CAS_Archive	0	CAS_Archive	0
CAS_Header_Sig	0	CAS_Header_Sig	0
CheckBox	580	CheckBox	580
Checklist	0	Checklist	0
Contracts	0	Contracts	0
Employee_Schedule	0	Employee_Schedule	0
Equip_Issue_Tracking	0	Equip_Issue_Tracking	0
Equip_Master	0	Equip_Master	0
Equip_Master_Images	0	Equip_Master_Images	0
Equip_Meter_History	0	Equip_Meter_History	0
Equip_Parent_Child	0	Equip_Parent_Child	0
Equip_Parent_Child_Hist	0	Equip_Parent_Child_Hist	0
Equip_Shadow	0	Equip_Shadow	0
Equip_Status_Hist	0	Equip_Status_Hist	0
Equip_Tasks	0	Equip_Tasks	0
Equip_Tasks_Checklist	0	Equip_Tasks_Checklist	0
Equip_Tasks_Contract	0	Equip_Tasks_Contract	0
Equip_Tasks_Variables	0	Equip_Tasks_Variables	0
Equipment_Schedule	0	Equipment_Schedule	0

Counts for both Source and Destination tables should be equal except where new tables have been added in Destination Tables.

If the Counts match, click the Finish Button.

Print Finish

Click **Finish**.

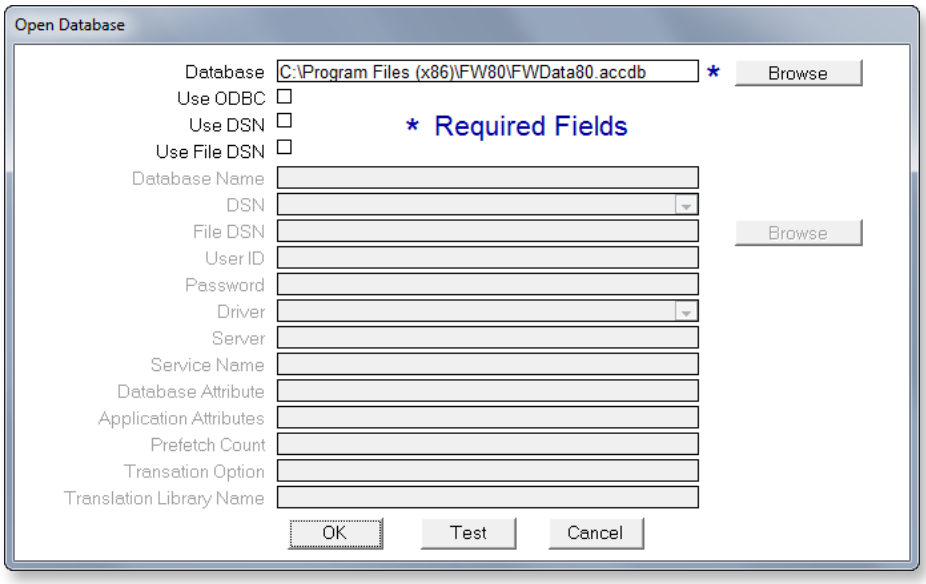
If you want to rename the new database or make a copy, it will be located here: C:\Program Files\FW80. If you want to move the new database to a server, do so now.

The last step is to connect to your new database. Open FaciliWorks 8 if it is not already open.

In the bottom right-hand corner, the path of the current database is displayed. FaciliWorks launches with the Sample database.

To connect to your database, click the **File** tab in the top left corner of the form and then click **Open Database**.

The **Open Database** dialog box will display:

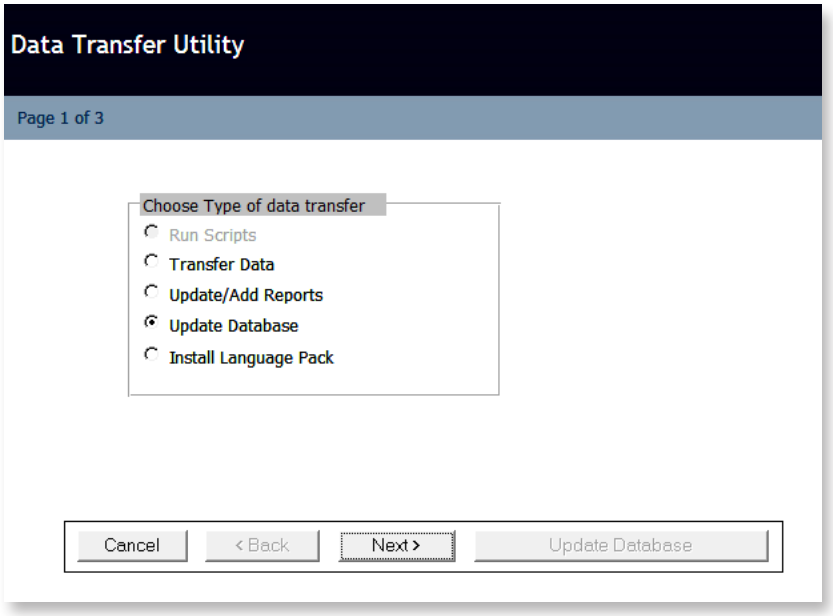


Click the **Browse** button to navigate to and select your database and then click **OK**. FaciliWorks will take a moment to connect to your database. Upon completion, the path to the location of your database is displayed in the bottom right corner of the window.

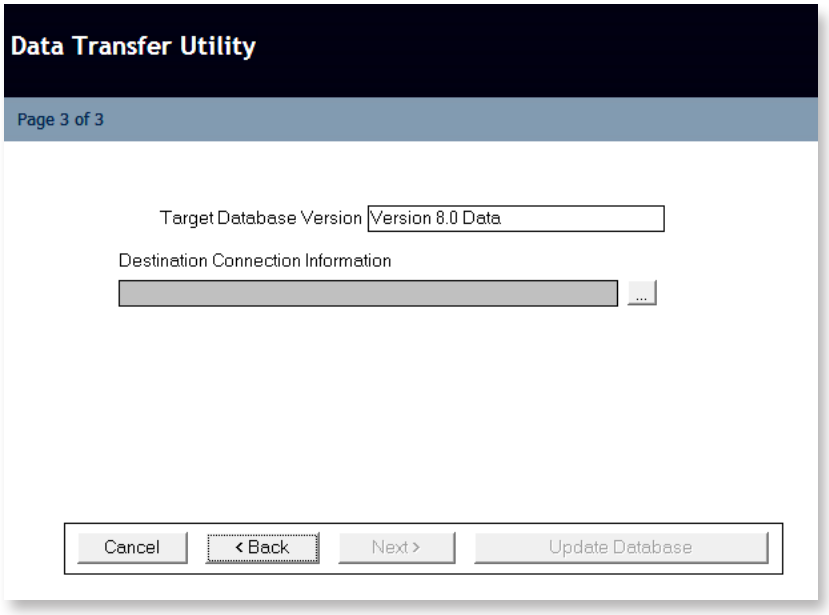
After completing the data transfer process, you may be prompted to update your database before proceeding. The message will say, "Your database is outdated. Do you want to close FaciliWorks and run the Update Database Utility?" Click **Yes** to update.

Updating Your Database

If you need to update your database, FaciliWorks will open the DTU. If it is not open, launch the DTU from the **Start** menu by clicking **Start ->All Programs -> FaciliWorks 8 -> Data Transfer Utility**. The DTU window will open:

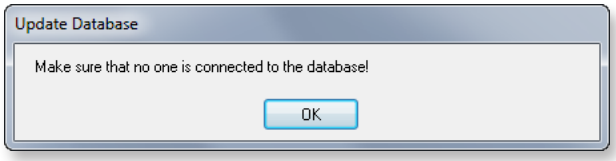


Click the **Update Database** radio button and then click **Next**. Updating the database is a two-step process; update the database and then update reports. The following window is now active:



The **Target Database Version** field auto-fills with **Version 8.0 Data**. If the **Destination Connection Information** field does not auto-fill with your database, click the browse button **[...]** to the right of that field to navigate to and select your database: C:\Program Files\FW80\FWData80.accdb. Then, click **Update Database**.

You will receive the following prompt to ensure that your database will not be corrupted during the update process:

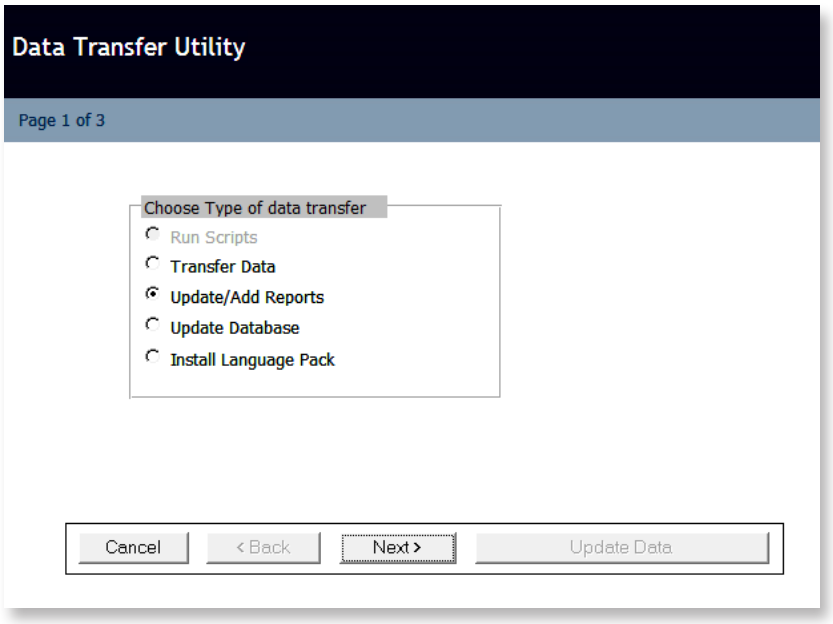


Click **OK**.

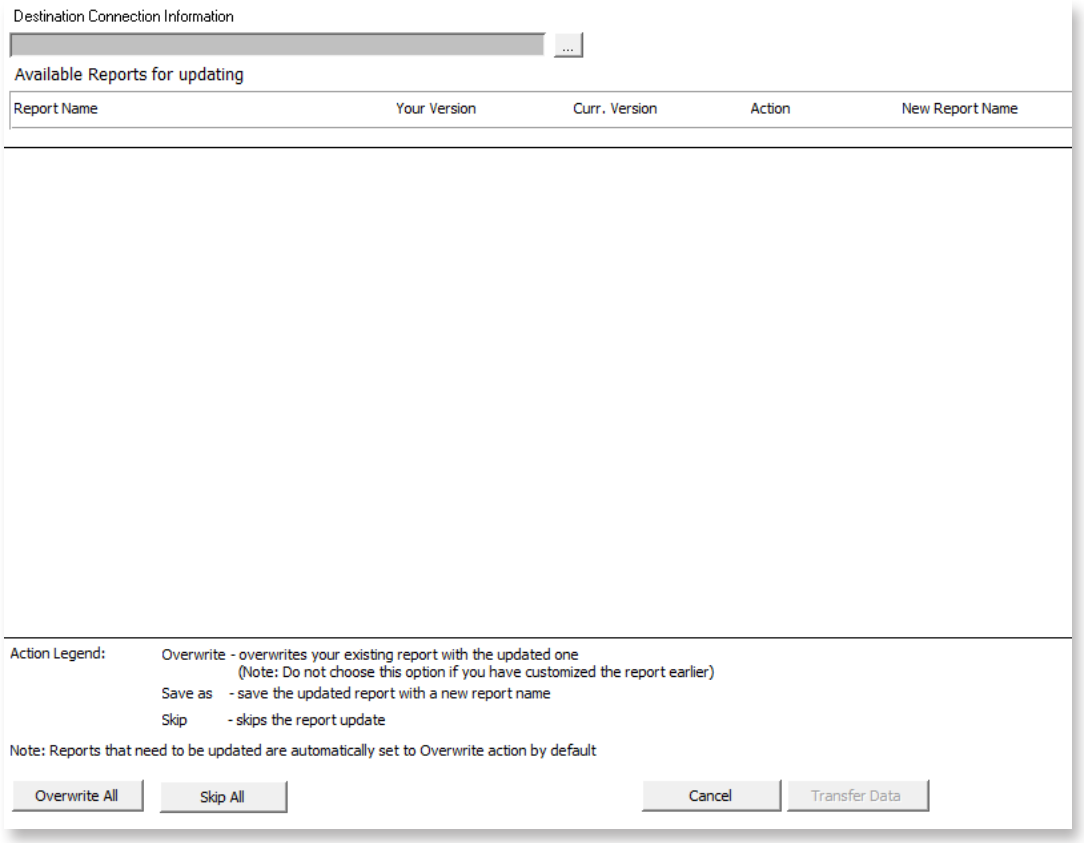
A message will tell you that your database has been updated successfully; if the database did not require an update, FaciliWorks will tell you that your database is already updated.

After updating your database, the second step is to update your reports.

The DTU is open. Click the **Back** button to return to the main DTU screen:

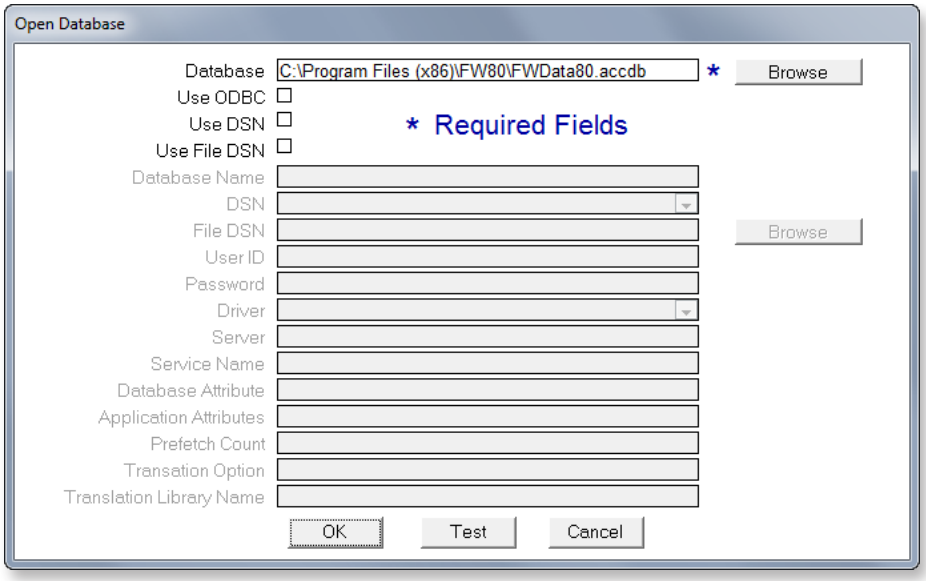


Click the **Update/Add Reports** radio button and then click **Next**; the following window is now active:

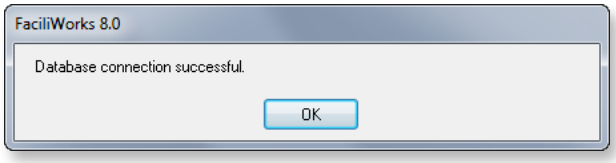

Destination Connection Information
...
Available Reports for updating
Report Name
Your Version
Curr. Version
Action
New Report Name
Action Legend:
Overwrite - overwrites your existing report with the updated one
(Note: Do not choose this option if you have customized the report earlier)
Save as - save the updated report with a new report name
Skip - skips the report update
Note: Reports that need to be updated are automatically set to Overwrite action by default
Overwrite All
Skip All
Cancel
Transfer Data

If the **Destination Connection Information** field does not auto-fill with your database, click the browse **[...]** button to the right of that field to navigate to and select your database:

C:\Program Files\FW80\FWData80.accdb

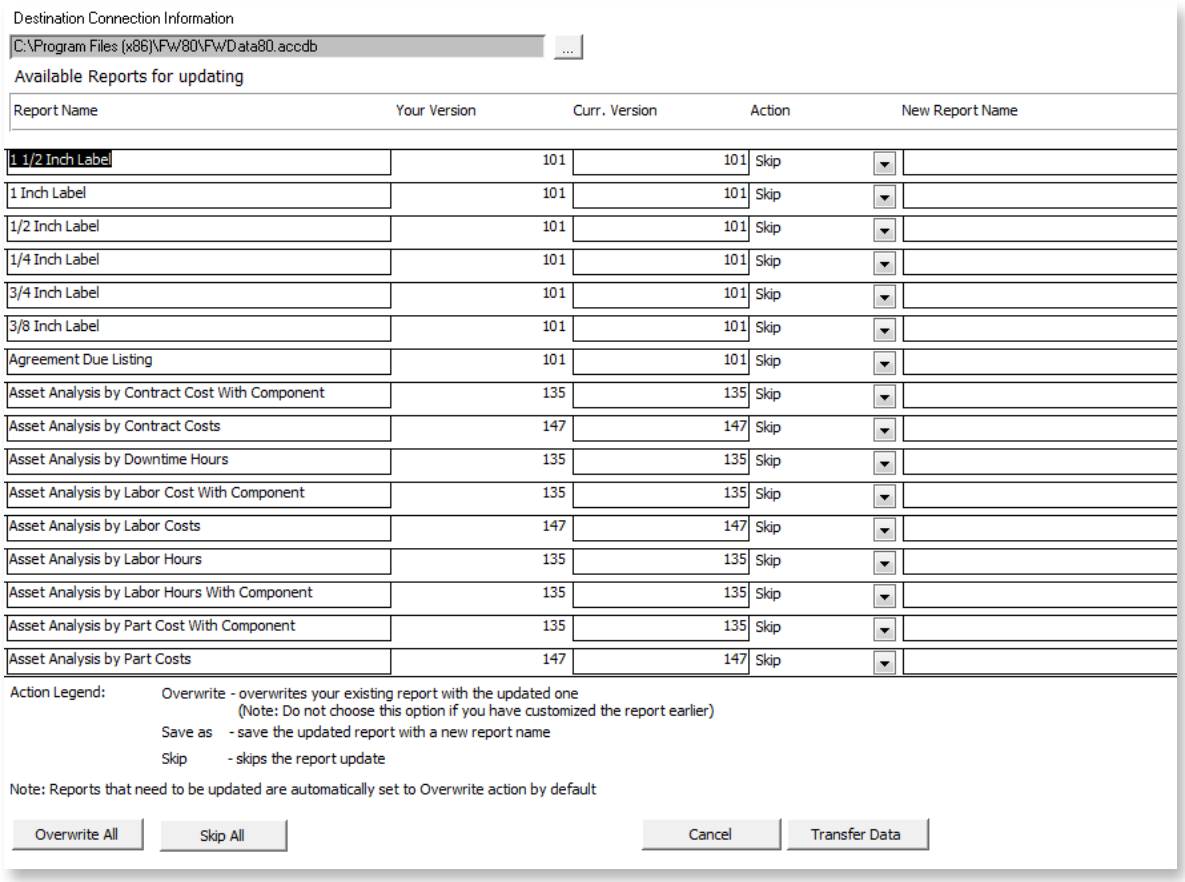


Click the **Test** button to test the connection:



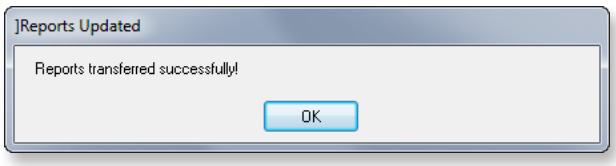
Click **OK** in the above message; the message will close. Click **OK** in the **Open Database** window; the window will close.

A list of reports showing both **Your Version** and **Current Version** is displayed:


Destination Connection Information
C:\Program Files (x86)\FW80\FWData80.accdb
...
Available Reports for updating
Report Name | Your Version | Curr. Version | Action | New Report Name
1 1/2 Inch Label 101 101 Skip
1 Inch Label 101 101 Skip
1/2 Inch Label 101 101 Skip
1/4 Inch Label 101 101 Skip
3/4 Inch Label 101 101 Skip
3/8 Inch Label 101 101 Skip
Agreement Due Listing 101 101 Skip
Asset Analysis by Contract Cost With Component 135 135 Skip
Asset Analysis by Contract Costs 147 147 Skip
Asset Analysis by Downtime Hours 135 135 Skip
Asset Analysis by Labor Cost With Component 135 135 Skip
Asset Analysis by Labor Costs 147 147 Skip
Asset Analysis by Labor Hours 135 135 Skip
Asset Analysis by Labor Hours With Component 135 135 Skip
Asset Analysis by Part Cost With Component 135 135 Skip
Asset Analysis by Part Costs 147 147 Skip
Action Legend:
Overwrite - overwrites your existing report with the updated one
(Note: Do not choose this option if you have customized the report earlier)
Save as - save the updated report with a new report name
Skip - skips the report update
Note: Reports that need to be updated are automatically set to Overwrite action by default
Overwrite All
Skip All
Cancel
Transfer Data

Within this form, you will determine which reports to update and which to keep intact. This is important if you have customized reports. If not, you can retain the default settings which will result in overwriting all of the reports where **Your Version** (target) is older than (numerically less than) the **Current Version** (available). You can manually **Overwrite All**, **Skip All** or select individual reports for **Overwrite** or **Skip** (by making a selection from the corresponding **Action** drop-down list).

Make your selections and then click the **Transfer Data** button; the following confirmation message will appear:



Click **OK** to close the message. The values in both the **Your Version** and **Current Version** fields will display the same reference number.

The update procedure is now complete. Close the DTU. You are ready to re-launch FaciliWorks.

Chapter Three:
Program Conventions

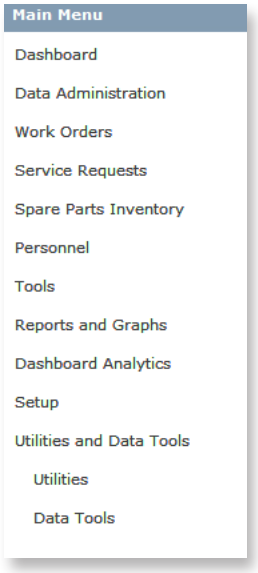
To save time and provide consistency, FaciliWorks uses certain operational conventions. It is highly recommended that you become familiar with these conventions before you begin using FaciliWorks. Conventions help you navigate through, add, edit, delete, retrieve and print records. Shortcut keys help you save data entry time and avoid mistakes.

The FaciliWorks Application Window

The FaciliWorks application window consists of various elements to assist you as you navigate through the program.

Main Menu

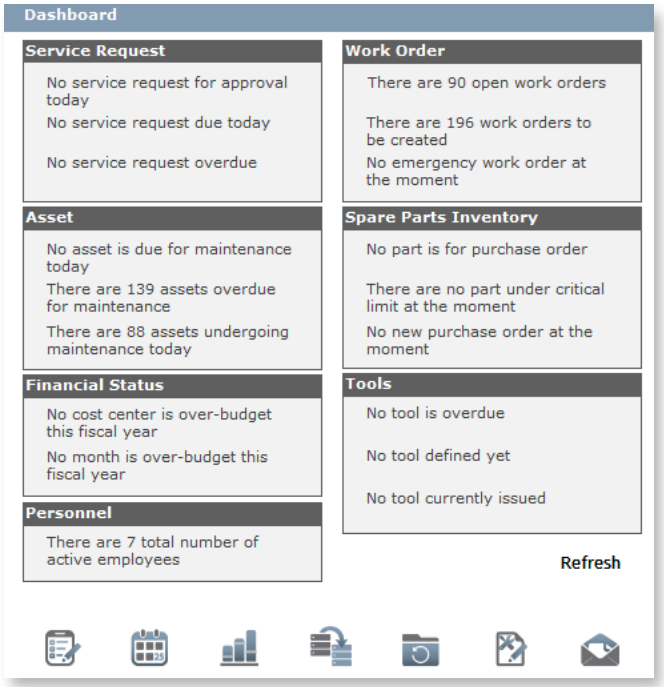
The main menu is the list of items along the left-hand side of the FaciliWorks window. Each item is a link that allows you to navigate to a submenu. Click **Data Administration** to see options for entering Asset, Task, Supplier, Procedure and other data records as well as updating meter readings on all assets. Clicking **Work Orders** displays options to create scheduled and unscheduled work orders. Clicking **Inventory** allows you to record all parts used in preventative maintenance and to create purchase orders.



Dashboard

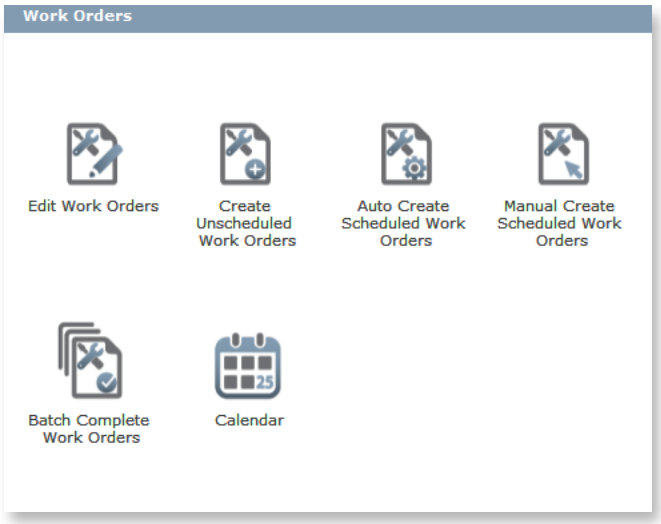
The FaciliWorks **Dashboard** is a new feature for Desktop version 8. The **Dashboard** is an automatic management monitoring system – a convenient summary of current maintenance, pending purchase orders, service requests needing approval and budget summaries.

Simply click a link within the summary boxes of the dashboard to navigate to the point of interest. At the bottom of the **Dashboard**, in the center section, are seven **Dashboard Shortcut** icons that help save you time when accessing frequently-used options in any of the submenus. Rolling the mouse pointer over each icon displays the shortcut option. Return to the **Dashboard** from any location within the software by clicking the **Dashboard** link at the top of the main menu.


Dashboard
Service Request
No service request for approval today
No service request due today
No service request overdue
Work Order
There are 90 open work orders
There are 196 work orders to be created
No emergency work order at the moment
Asset
No asset is due for maintenance today
There are 139 assets overdue for maintenance
There are 88 assets undergoing maintenance today
Spare Parts Inventory
No part is for purchase order
There are no part under critical limit at the moment
No new purchase order at the moment
Financial Status
No cost center is over-budget this fiscal year
No month is over-budget this fiscal year
Tools
No tool is overdue
No tool defined yet
No tool currently issued
Personnel
There are 7 total number of active employees
Refresh

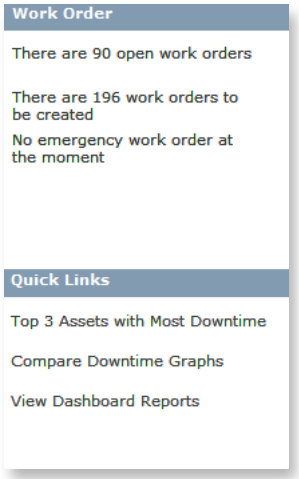
Submenu Pane

The **Submenu Pane** is visible in the center pane of the FaciliWorks application window after clicking any main menu item other than Dashboard. Each submenu has a unique set of functions associated with the option selected. For example, the image here depicts the functions accessible for the **Work Orders** option. Clicking a submenu function button will display the corresponding information form.



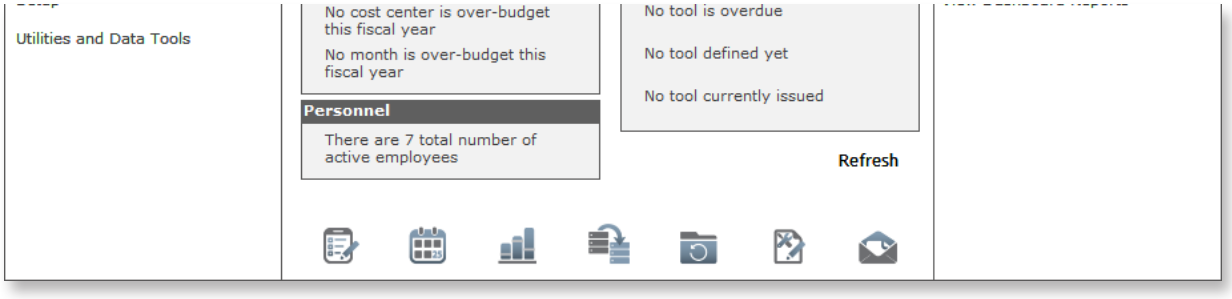
Status Pane

The **Status Pane** is on the right-hand side of the FaciliWorks application window. A summary of the active main menu option is shown in the top portion of the pane. For example, the summary here is for the **Work Order** menu option. **Quick Links** to navigate to specific graphs and reports are displayed in the lower portion of the pane.


Work Order
There are 90 open work orders
There are 196 work orders to be created
No emergency work order at the moment
Quick Links
Top 3 Assets with Most Downtime
Compare Downtime Graphs
View Dashboard Reports

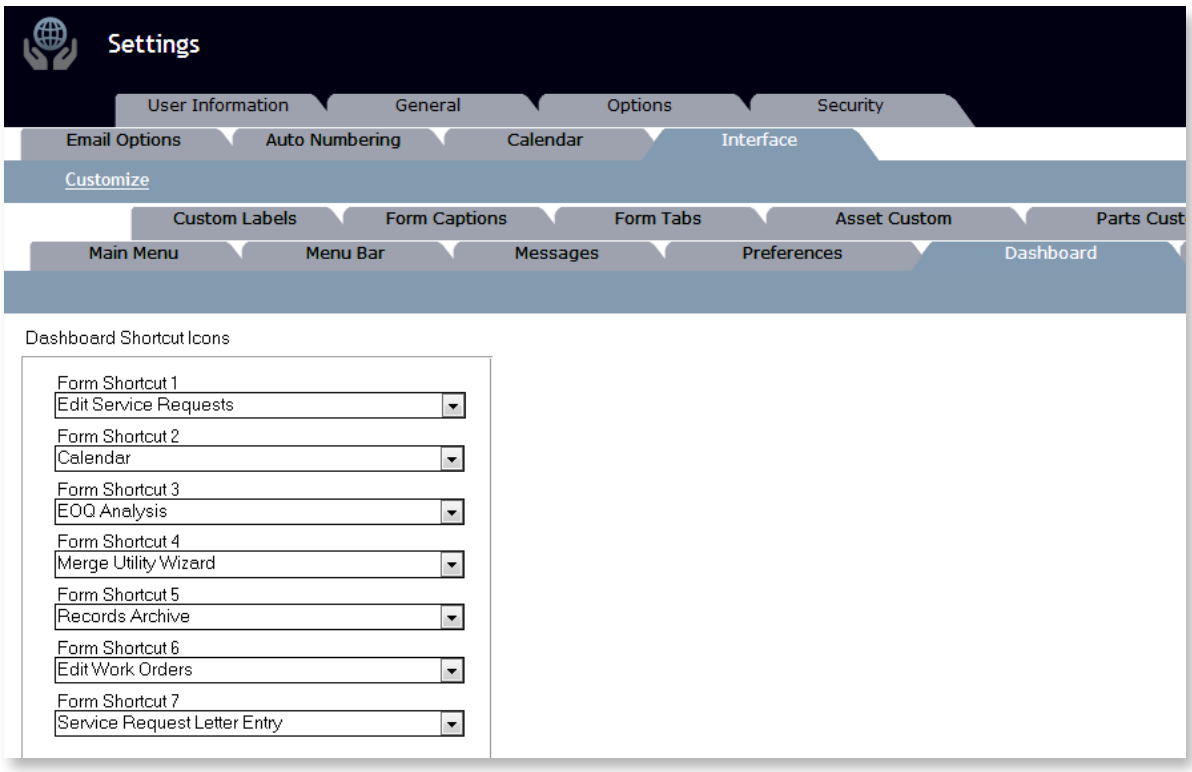
Dashboard Shortcut Icons

Located along the bottom of the dashboard are seven shortcut icons:

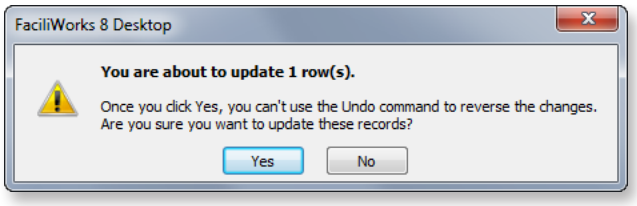

Utilities and Data Tools
No cost center is over-budget this fiscal year
No month is over-budget this fiscal year
Personnel
There are 7 total number of active employees
No tool is overdue
No tool defined yet
No tool currently issued
Refresh

Assume that your day begins by approving service requests and then creating work orders. Your shortcut icon display can be modified to accommodate your preferences.

To customize these icons, click **Setup** from the main menu, then click **Settings** from the submenu, then click the **Interface** tab. Clicking the **Interface** tab displays several sub-tabs beneath it. Click the **Dashboard** sub-tab. (This navigation path can be written concisely as: **Setup -> Settings -> Interface -> Dashboard** sub-tab.) Seven **Form Shortcut** fields with drop-down lists are displayed:



Use the drop-down list in the **Form Shortcut 1** field to select Edit Service Requests. A warning message appears:


FaciliWorks 8 Desktop
You are about to update 1 row(s).
Once you click Yes, you can't use the Undo command to reverse the changes.
Are you sure you want to update these records?
Yes
No

Click **Yes**.

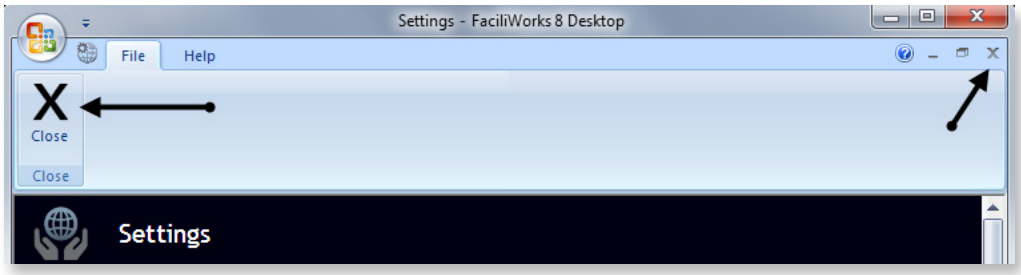
Use the drop-down list in the **Form Shortcut 2** field to select Edit Work Orders. The above warning message appears again; click **Yes** to close the message.

Close the **Settings** window to return to the main menu by doing one of the following:

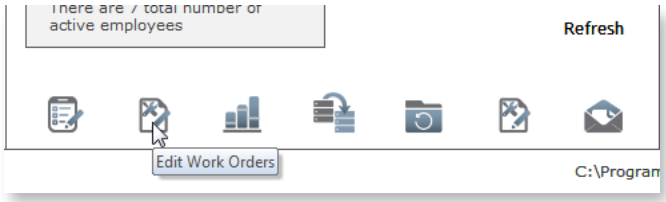
- Click the **Close** button in the **File** menu

OR

- Click the smaller of the two **X**s in the upper right corner of the window.



From the main menu, click **Dashboard**. Roll the mouse pointer over the first two quick link icons. They should reflect your new choices; if not, click **Refresh**.



Maximize/Minimize/Restore/Close Buttons

Use these buttons, located in the upper right corner of the form, to **Maximize** the form to the largest size allowed or to **Minimize** the form to an icon. If you maximize the form, then the **Maximize** button becomes the **Restore** button. Click **Restore** to return the form to its original size.

Minimize:

Maximize:

Restore:

Close:

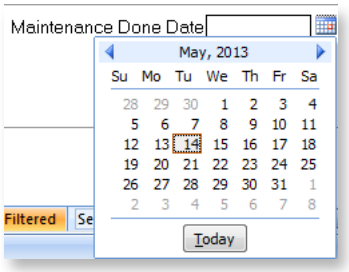
Drop-down List Button

Drop-down list buttons indicate that a field contains a list of available items from which to choose. When you click the button, the list appears in a scrollable box. Click any item in the list to enter it in the field.

Pop-Up Calendar Icon

The pop-up calendar allows you to enter dates by choosing them from a calendar rather than manually typing them. This is very helpful when you are not sure which date format is required. When you click a date field, the calendar icon appears.

Click the calendar icon to the right of the date field. When the calendar first appears, it displays the current month, day and year:



To select a different date, click the left or right arrows to navigate to the desired month and year and then click the day of the month. The date field will auto-fill with the date selected. Click the **Today** button to select the current date. To close the calendar, click anywhere on the form.

Record Navigation Bar

The **Record Navigation Bar** is at the bottom-left corner of the FaciliWorks application window after you have navigated to one of the submenus. It displays the current record and includes buttons to navigate to the first, previous, next, last and new records.

In the example above, the current record is the 9th record in a set of 51 total records residing in the database table. This is a location only, relative to the other records in the table, not the actual record ID. Therefore, as records are added and deleted, the record location within the set may change. To go to the 26th record, click and drag your cursor over 9 of 55 to select it and then type 26. Press the Enter key on your keyboard. The 26th record is now displayed.

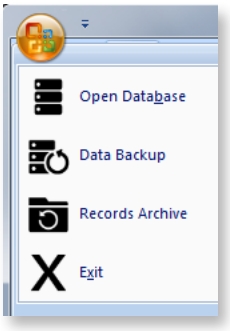
Button	Action
	Go to first record
	Go to previous record
9 of 51	Current record of total records
	Go to next record
	Go to last record
	Create new record
Filtered / Unfiltered	Current records are filtered or unfiltered
Search	Search for a specific record

The **Filtered/Unfiltered** button on the record navigation bar is a toggle switch; when your records are filtered, the button will be orange (active) and display **Filtered**. A filtered set of records is a subset of the total based on specified search criteria. When you click the **Filtered** button, the filter will turn off (become inactive), the button will then be the same color as the navigation bar and will display **Unfiltered**. When records are unfiltered, all records in the database table are displayed. Please see **Filtering Records** for more information.

The **Search** field is another way to locate a specific record from the database table. This is helpful when the table contains many records. Place the mouse pointer in the field you wish to search (either on the form or datasheet) and then type the value in the **Search** field. FaciliWorks will locate the record for you. Using the scroll bar to the right of the **Search** field allows you to see data that is not immediately visible.

The Office Button

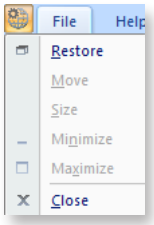
The **Office Button** is located in the top left corner of the FaciliWorks window. The **Open Database** and **Exit** commands in this menu are the same commands available when you click the **File** tab while in the **Main Records** menu. These commands are available regardless of your location within the program. Both the **Exit** command under the **Office Button** and the **Exit** button at the bottom right of the menu will close FaciliWorks.



The **Data Backup** and **Records Archive** commands are also in the **Office Button** menu. These commands will be discussed later in the **Utilities** chapter.

Control Menu Icon

The **Control Menu Icon** is located next to the **Office Button**. If you click on it once, a menu will appear, allowing you to change the form's size and location. If you double-click the control icon, it closes the current window.



User and Database Info

The **User and Database Info** is shown at the bottom of the FaciliWorks application window. When FaciliWorks Desktop 8 is launched for the first time, the sample database is loaded into the program by default and the navigation path to the location of the current database is displayed in the lower right corner of the application window. We will discuss how to point the program to your company's database later.

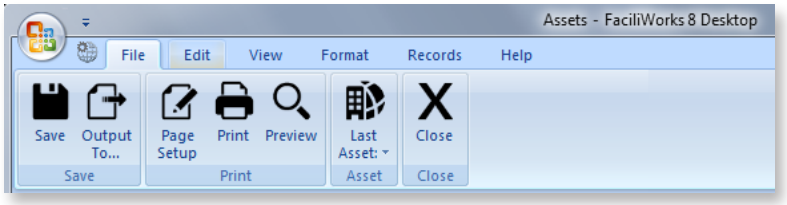
The sample database does not have security enabled. Therefore, a login User ID and password are not required when launching FaciliWorks for the first time. This is reflected as **No User Name** in the lower left corner of the application window. After you enable security and log in to FaciliWorks, the User ID will be displayed. We will discuss how to enable security later.

Scroll Bars

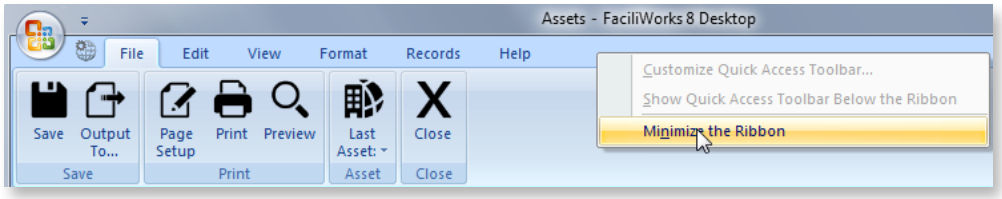
Scroll bars might appear on the right side and/or the bottom of a form. You can use them to scroll to portions of the form that aren't immediately visible (which can happen if you've reduced the form's size from its original design).

The Ribbon

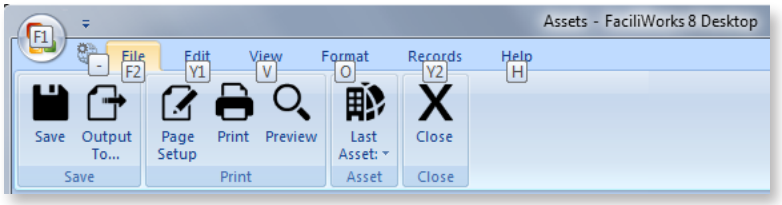
When you launch FaciliWorks, you will notice that the software no longer includes the typical drop-down lists and toolbars found in previous versions. Desktop 8 is built on the Microsoft Access 2007 platform and thus uses the new **Ribbon** technology. The **Ribbon** is a new interface component that contains task-specific commands grouped together under different command tabs and is located at the top of your document window. The **Ribbon** enables you to easily identify the desired tools or functions and perform both simple and advanced operations without having to navigate extensively.



To hide the **Ribbon**, right-click the **Ribbon**, then click **Minimize the Ribbon**. This command is a toggle switch; clicking it again will make the **Ribbon** visible.



To access the functions within the **Ribbon** by keyboard, press <F10>. Access keys will display:



Press one of the access keys to move to the next menu option. For example, press Y2 to see the **Records** options and then press KN to obtain a new record.

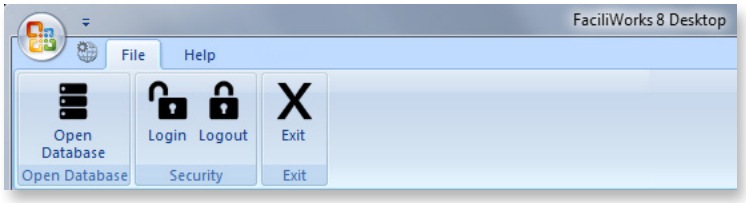
Press the Dash (-) to view the file options.

Main Ribbon Tabs

The Ribbon tabs replace the traditional menu bar utilized in previous versions of FaciliWorks. These tabs give you quick access to common program commands. Each tab consists of commands that are arranged into groups. Each group includes a combination of buttons and commands. The tab choices will change as you navigate to the various FaciliWorks menu options. Only one tab is visible at a time (active tab).

File Tab

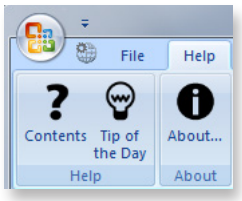
When in the Main Records menu, the **File** tab provides access to a set of commands that allow you to change the database you are currently viewing, log in as a different user, log out or exit FaciliWorks. Changing the current database is a responsibility of the system administrator.



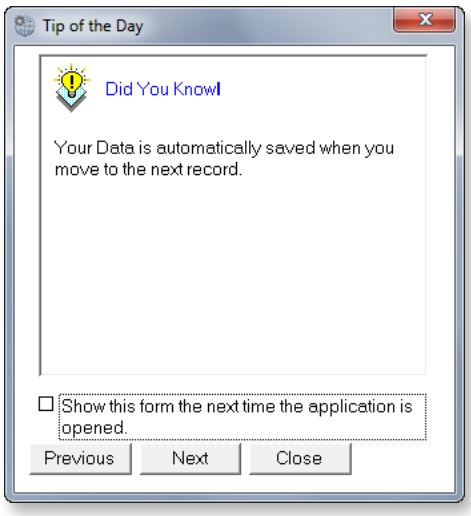
If security is not enabled and you click the **Login** button or **Logout** button, FaciliWorks will prompt you with messages letting you know that security is off.

Help Tab

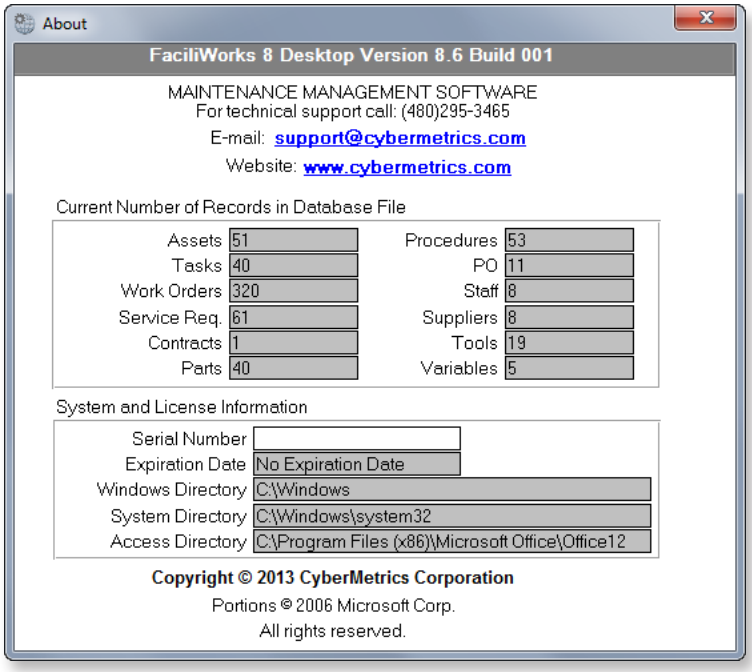
To use the FaciliWorks Help System, click the **Help** tab and then click **Contents** or press the F1 key on your keyboard.



When you select **Tip of the Day**, FaciliWorks will display helpful hints about using various functions and commands. You can navigate to the **Previous** and **Next** tips using the corresponding buttons. If you'd like this information to pop up each time FaciliWorks is launched, click the box at the bottom of the window. Click **Close** to close the window.


Tip of the Day
Did You Know!
Your Data is automatically saved when you move to the next record.
Show this form the next time the application is opened.
Previous
Next
Close

Click the **About** button for information regarding your current version of FaciliWorks, for technical support contact information, to view the number of records currently in your database and for system and license information. When calling technical support, you may be asked for the version and build of your software. The information is located at the top of the **About** window. If FaciliWorks prompts you to enter your serial number for the software, the **About** window will open; type your serial number in the appropriate text box.

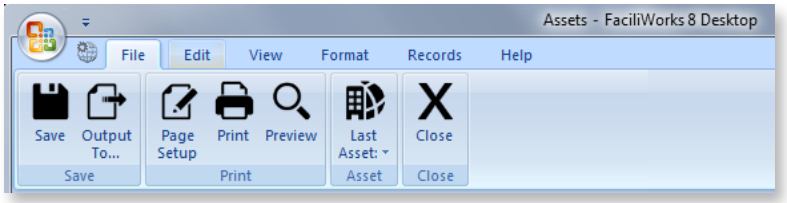


Submenu Ribbon Tabs

When navigating to a submenu, the Ribbon tabs change to reflect the commands that are available in that particular submenu with the exception of the **Help** tab, which remains the same.

File Tab

While in **Assets**, the **File** tab includes program commands to save, print, view most recent assets and close the submenu.



Although FaciliWorks automatically saves the current record whenever you navigate to a different record or close the form or table, you can manually save records by clicking the **File** tab and then clicking the **Save** button. You can also click the **Record Selector Bar** located on the left side of the application window to save a record. Please see **Record Selector Bar** for more information.

If you want to save the data in a different format, use the **Output To** command. Formats such as Rich Text format (.RTF), text (.txt), Microsoft IIS (.HTX, .IDC), Microsoft Excel (.XLS), Microsoft Active Server pages (.asp) or HTML (.HTM, .HTML) are available. When you save the output in .XLS or .RTF format, it includes fonts, layout and other formatting elements.

The **Print** group of commands is similar to those of other Microsoft software applications and is available in both Form View and Datasheet View. **Print Setup** enables you to set print options such as margin boundaries and page orientation such as portrait and landscape options as well as column sizes. **Print** allows you to set print range, type of printer and other properties such as page layout and print quality. **Print Preview** displays what will be printed on hardcopy.

To view a list of the assets most recently modified, click the **Last Asset** button to immediately navigate to the selected record. This option is available only under the **Asset** submenu.

Click **Close** to return to the Main Menu.

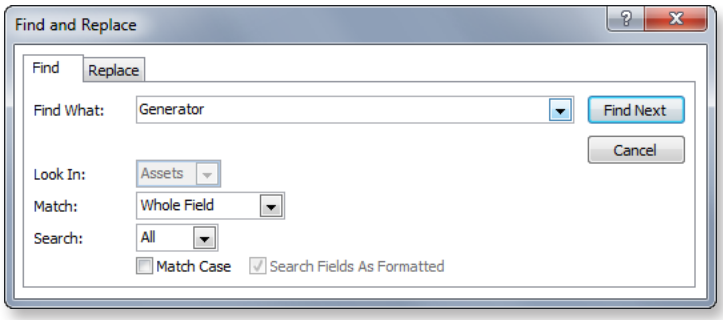
Edit Tab

The **Edit** tab includes program commands to **Undo** or **Redo** the last applied command, to **Cut/Copy/Paste** and to **Find** specified records.

Find Command

The **Find** command is available in the **Edit** tab in both Form and Datasheet Views. You can search for any phrase, word or part of a word. For example, you might look for assets located in a certain department or for assets you purchased last year. Because the **Find** dialog box remains on the form during searches, you can locate as many records as necessary. Drag the **Find** box out of the way to see your records – click the title bar of the dialog box and while holding the mouse pointer down, drag the dialog box.

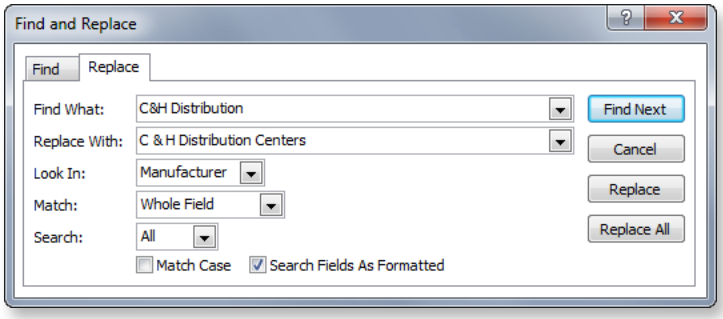
To find data, display the table or form of the records you want to search. Select the column or field in which you want to search by placing the mouse pointer in the field (searching a single field is faster than searching all fields). Then, on the **Ribbon**, click the **Edit** tab and then click **Find**. The program displays the **Find and Replace** dialog box. In the **Find What** field, type the text you want to locate. Use wildcard characters (such as "*" or "?") to make your search more general. Please see **Supported Wildcard Characters in Search Fields** for more information.



For faster searches, search for the first few characters in a single field. Set **Match** options as shown on the drop-down list. To find the first instance of the text, click the **Find Next** button. To find the next instance and all subsequent instances, click the **Find Next** button again. When you're finished, click the **Cancel** button.

Replace Command

The **Replace** command is available in the **Edit** tab in both Form and Datasheet Views. You can find and replace all or some occurrences of a phrase, word or part of a word. For example, if a manufacturer changes its name, put your cursor in the **Manufacturer** field and then use the **Replace** command to update your records as shown in the image below.



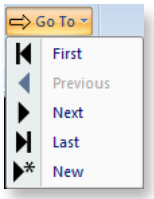
To replace data in a table, navigate to the record containing the data you want to replace. Select the field in which to replace data. Click the **Edit** tab and then click the **Replace** button. The program displays the **Find and Replace** dialog box. Click the **Replace** tab. In the **Find What** field, type the text you want to find. If you use wildcard characters, you may want to confirm text replacements to ensure that the replacements are correct.

In the **Replace With** field, type the replacement text. Set values for the **Look In** and **Match** fields using the drop-down lists. Use the **Search** field drop-down list to select Up, Down or All for the direction in which you want to search.

Click the **Find Next** button to find the first occurrence of the text. The program will display the record. Click the **Replace** button to replace the highlighted text with the text in the **Replace With** box. If you choose not to replace this record instance, click **Find Next** to go to the next occurrence. Continue to click **Find Next** until you have located all instances. To replace all occurrences without confirmation, click the **Replace All** button.

Go To Command

Use the **Go To** command on the **Edit** tab to quickly advance to different records. The submenu offers you the following options to help you navigate through your records; the **Record Navigation Bar** at the bottom left corner of the FaciliWorks application window provides the same options:



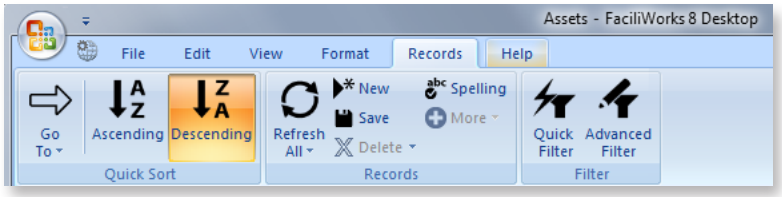
Command	Description
First	Move from the current record to the first record.
Last	Move from the current record to the last record.
Next	Move to the next record.
Previous	Move from the current record to the previous record.
New	Move to a blank record at the end of your record set.

View Tab

In the FaciliWorks database, data is arranged into rows and columns called tables. The program provides two primary views for using tables: Form View and Datasheet (table) View. Form View displays the data one record at a time, while Datasheet View displays all records in the form of a table or spreadsheet. Please see the **Form View** and **Datasheet View** sections for details.

Records Tab

The **Records** tab provides options to sort and filter the record display in both Form and Datasheet Views.



Go To: Navigate through the records, i.e., click the buttons to go to the first, next, previous, last or new record.

Ascending and Descending: Specify the order of the records as either alphabetical order or reverse.

Refresh All: Refresh the screen with the most current modifications of records.

New: Create a new blank record for data entry.

Save: Manually save modifications to the current record.

Delete: Delete the last change to the record field, or delete the entire record.

Spelling: Check spelling throughout the records.

More: Visible in Datasheet View only, this function allows you to specify the same commands as those on the **Format** tab.

Quick Filter: Find records based on a simple search.

Advanced Filter: Find records based on a complex search.

Records Tab – Quick Sort Group

All options in the **Quick Sort** group are available on other tabs and shortcut menus. Use the **Go To** button to navigate through the record group (also use the **Record Navigator Bar** at the bottom-left corner of the application window). The **Ascending / Descending** buttons will sort the records in alphabetical or reverse alphabetical order.

Records Tab – Records Group

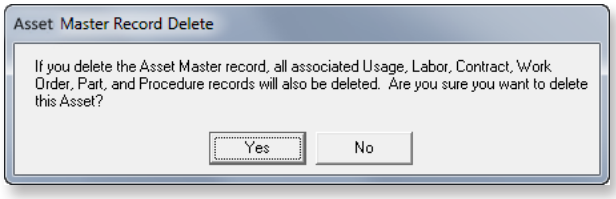
The **Records** group provides commands to refresh record modifications, add, save and delete records, check spelling and modify display settings (in Datasheet View only).

The **New** button will display a new blank record for data entry. This is the same function as clicking the **New** (blank) record button on the **Record Navigation Bar** at the bottom left corner of the application window.

Use the **Save** button to manually save any modifications to the current record. Records can also be manually saved by clicking the **Record Selector** bar on the left of the application window. The current record will be automatically saved when you navigate to the next record.

The **Delete** button performs two functions. Clicking **Delete** will simply delete the contents of the active field (the field selected or where the cursor is situated). To reverse the delete action, click the **Edit** tab and then click **Undo Delete**.

Click the **Delete** button drop-down list to display delete options. **Delete Record** will delete the entire active record. This action cannot be reversed once the record is deleted. To acknowledge this action, FaciliWorks will display the following message:

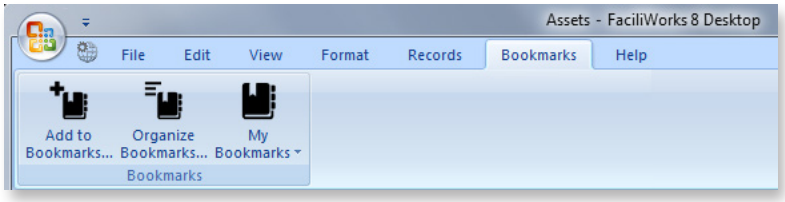

Asset Master Record Delete
If you delete the Asset Master record, all associated Usage, Labor, Contract, Work Order, Part, and Procedure records will also be deleted. Are you sure you want to delete this Asset?
Yes
No

Records Tab – Filter Group

In the **Filter** group, FaciliWorks includes innovative **Quick Filter** and **Advanced Filter** features, allowing you to easily search for a particular record or group of records based on criteria you specify. These commands become quite useful as your database becomes larger. The filters are available on the first tabbed form of each data entry module (such as the **Assets -> Information** tab and **Procedures -> Text** tab).

Bookmarks Tab

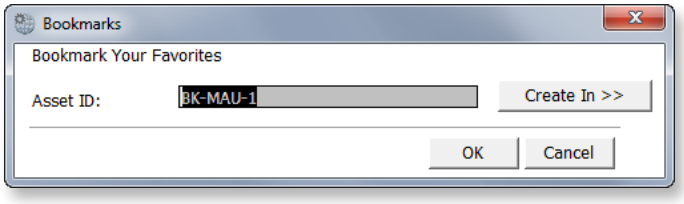
You can bookmark records you frequently use or access, making it easy for you to find the data you need. To do so, simply access the **Bookmarks** tab from the Ribbon and add the record to your bookmarks. If you no longer need a bookmarked record, you can delete it. You can also organize the records you have marked as your **Favorites**.



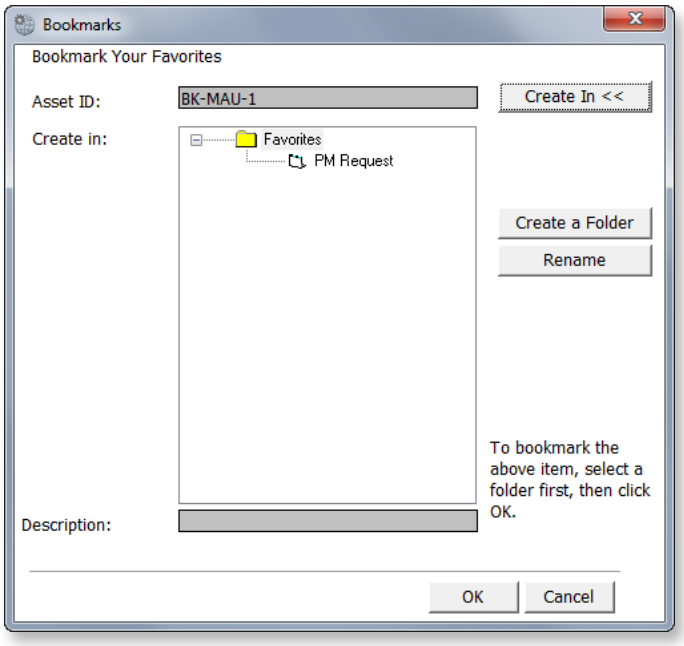
Add to Bookmarks

Select the record you want to bookmark. Click **Add to Bookmarks** under the **Bookmarks** tab.

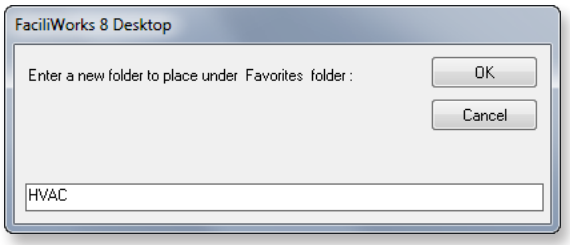
In the **Bookmarks** dialog box, the record you want to bookmark is auto-filled in the text box.



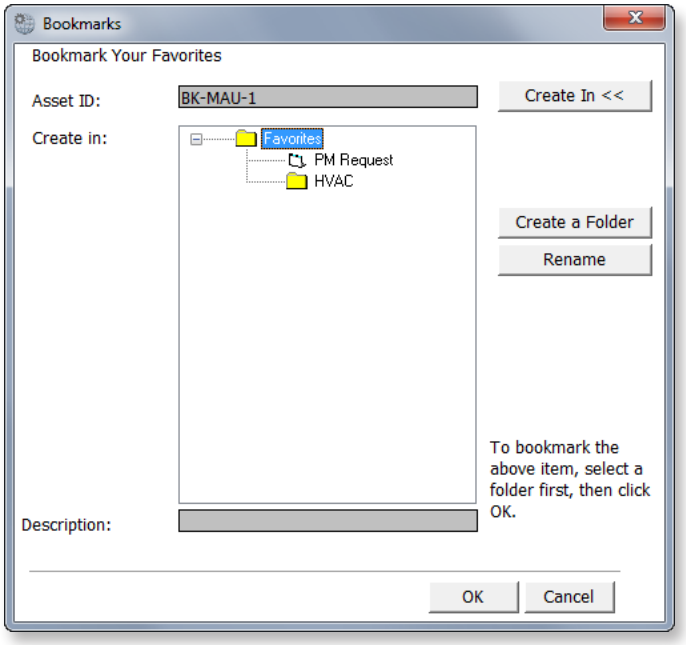
To place the record into your bookmarks, click **OK**. To place the bookmark into a specific location in your bookmark hierarchy, click **Create In**.



Select the folder in which you would like to store your bookmark and then click **OK** or create a new folder by clicking the **Create a Folder** button.



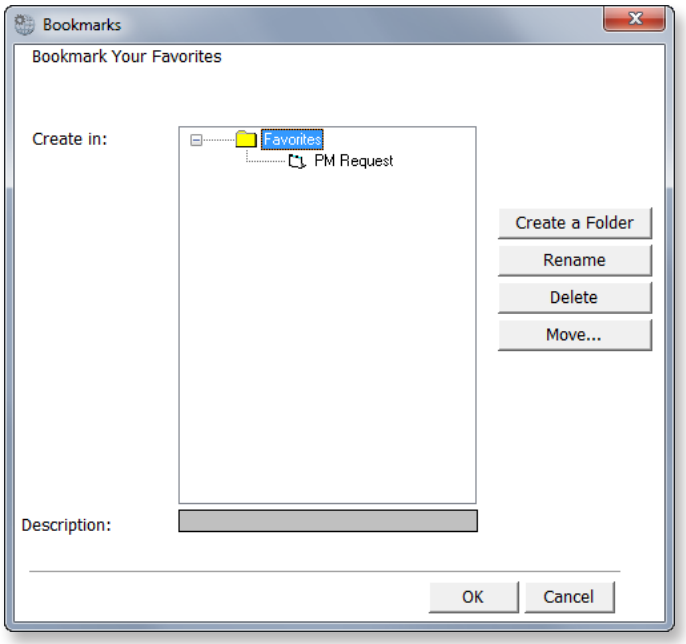
In the **Create Folder** text box, type the name of your new folder and then click **OK**. The new folder is added to the **Favorites** list. You can also add a description to the folder at the bottom of the **Bookmarks** window.



Select the folder and click **OK**.

Organize Bookmarks

Click **Organize Bookmarks** under the **Bookmarks** tab. Click **Create a Folder** to add a new folder to your bookmarks. To change the name of a folder, click **Rename**. FaciliWorks will highlight the folder. Type the new folder name.

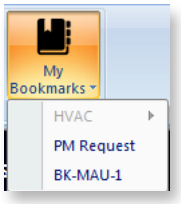


To delete an item from **Bookmarks**, select the item to be deleted and click **Delete**. FaciliWorks will acknowledge the delete action. Click **Yes** to delete.

To relocate an item in bookmarks, select the item and then click **Move**. Select a new destination folder.

My Bookmarks

Click **My Bookmarks** under the **Bookmarks** tab to access your bookmarks.

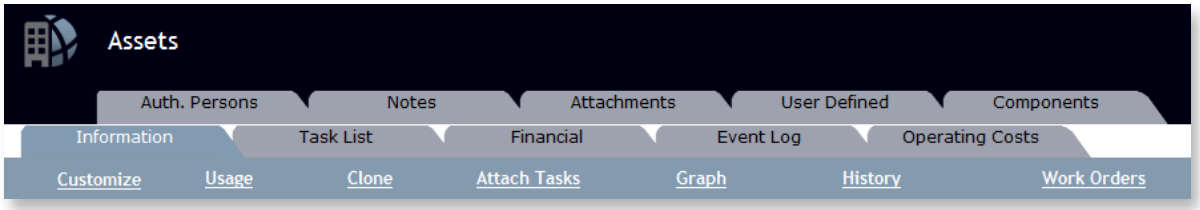


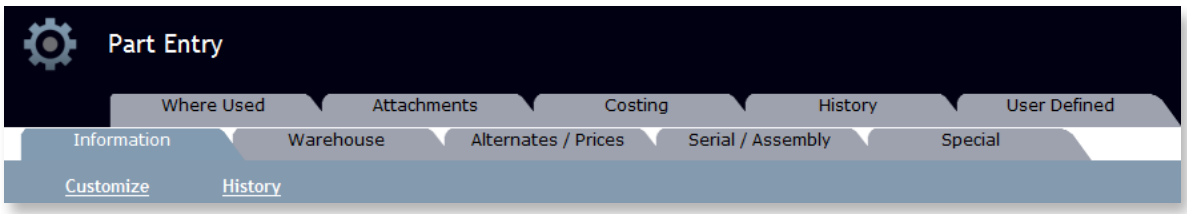
Form View

When you click an option from the Main Menu and then select a submenu button, records are displayed in Form View by default. A form is a graphical interface that is used to display and edit data. Form View displays one record at a time. As you enter data into the form, use the Tab key on the keyboard to advance to the next field. Field text boxes will hold up to 50 characters of data and will display 32 characters on the form.

Form Header

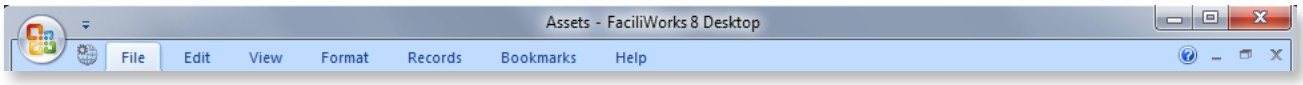
When in form view, the header contains the title of the section (the selected submenu option) and the various related tabs. The buttons located under the tabs show the functions that can be performed in that section. In the example below, notice the **Clone** option; Assets can be cloned, but this operation is not available for Parts.





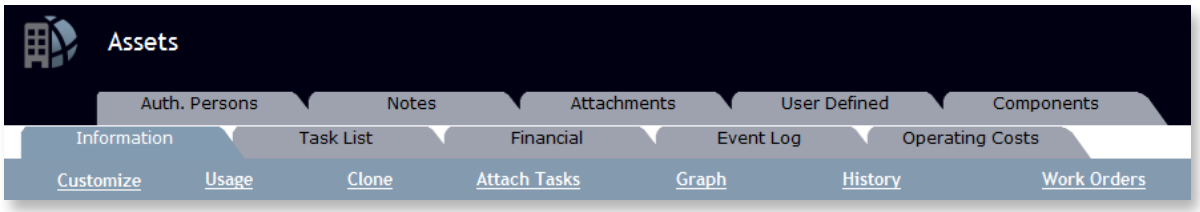
Form Title Bar

Located at the top of each form, this bar contains the title of the current form and program name. You can click the title bar and drag it to move the window to a new location.



Tabs & Command Buttons

Each tab contains an entry form that displays specific information as well as a set of command buttons. Within each tab, you can edit or view information for the current record. The buttons located under the tabs show the accessible functions for that form. The tabs shown here are available within **Data Administration -> Assets**.



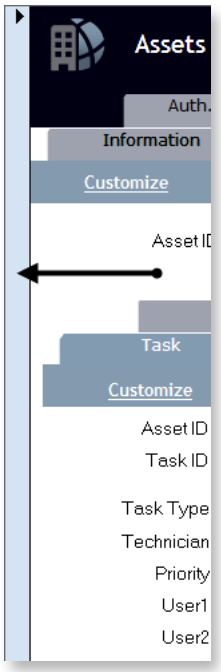
Colored Controls & Messages

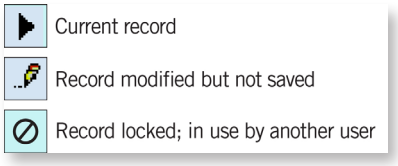
Information shown in gray fields is permanently associated with a record and cannot be edited. For example, a description is linked to a part number and an employee's name is linked to his or her employee ID. If you want to change information displayed in a non-editable field, go to the original entry form and change the information in the master record. Changes you make to the master record will appear wherever the information appears.

Yellow fields show calculated or automatically updated information. If necessary, you can edit this information manually. Red, yellow, blue or green messages can appear on different forms throughout FaciliWorks to alert you to situations or items that require attention.

Record Selector Bar

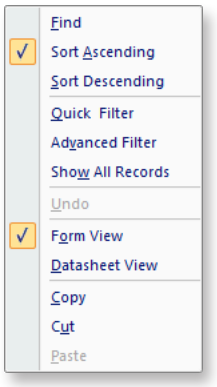
This tall rectangular bar is located on the left side of the form. Use it to select the entire record for subsequent copying or deletion. You can also use it to save changes to the record (if you change any fields, a pencil icon will appear on the bar, indicating that you can click the bar to write your changes to the database).





Shortcut Menu

Within any FaciliWorks data entry window, you can right-click anywhere on the form to open a shortcut menu. The options available on the shortcut menu include: find or sort records, filter records, undo the last command, switch to Datasheet View and cut, copy or paste data. Each command is explained below.



Find: Search for any phrase, word or part of a word.

Sort Ascending & Sort Descending: Click in the field by which you want to sort and right-click to see the menu. Use these commands to sort the data either alphabetically or in reverse-alphabetical order.

Quick Filter: Perform simple searches based on a pre-defined set of criteria.

Advanced Filter: Perform more complex searches on criteria that you select.

Show All Records: If a filter has been set to display a subset of your records, this command resets your display to show all records.

Undo: Remove any modifications to a selected field. If a record is not selected, all modifications made to the current record are removed.

Form View & Datasheet View: Switch between Form View and Datasheet View.

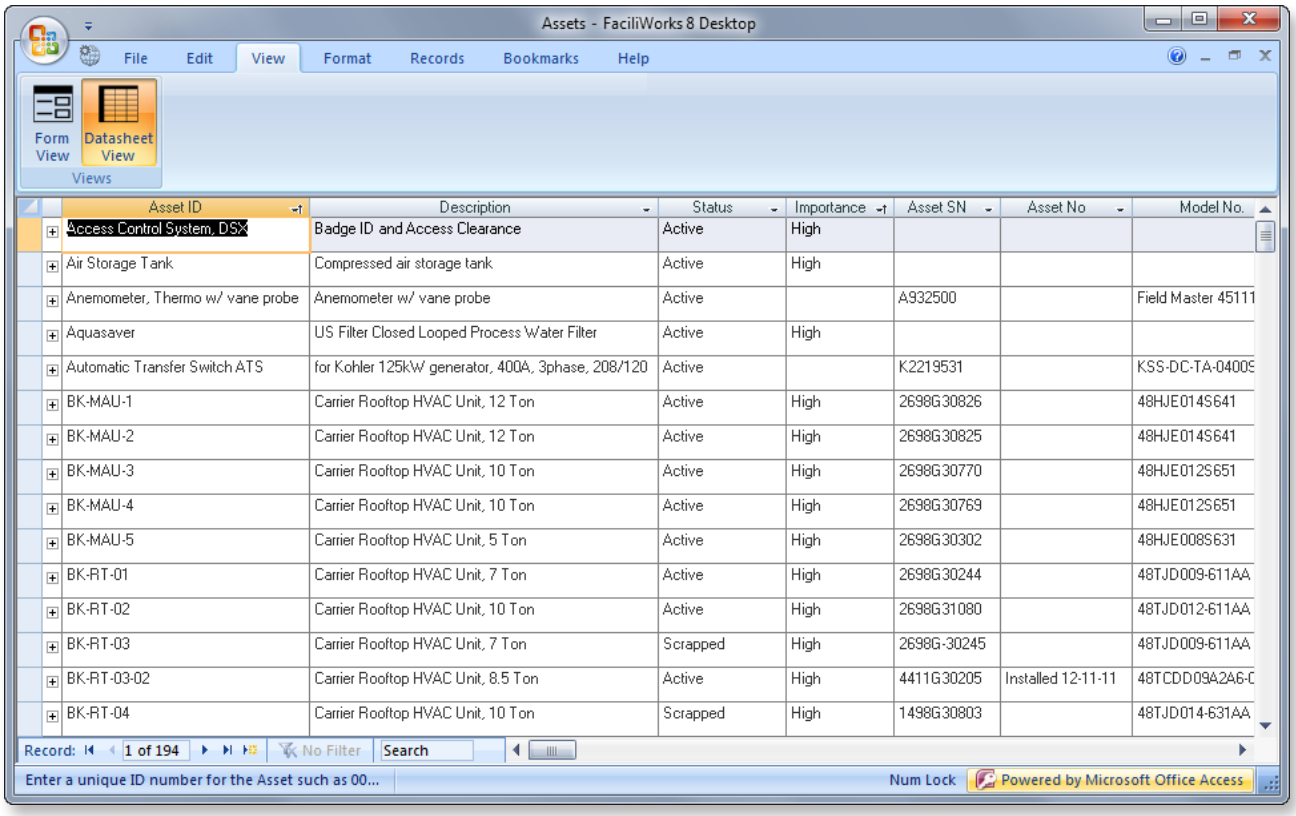
Copy: Copy selected contents to the clipboard.

Cut: Delete the selected text and place it on the clipboard.

Paste: Paste the contents of the clipboard into the specified location.

Datasheet View

Datasheet View (also called Table View) displays the records in a table similarly to a spreadsheet. Therefore, it can be a more efficient interface for adding or modifying records. Each row represents a record; each column represents a field. The column headers are the field names of the data stored in the database. To switch from Form View (default), click the **View** tab on the ribbon and then click **Datasheet View**.

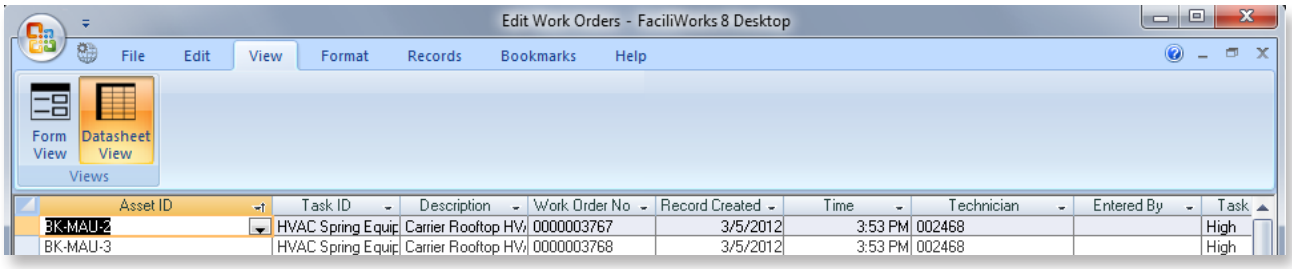


This format is more flexible than Form View as you can resize column widths and row heights, rearrange column positions, hide columns, freeze and unfreeze columns and rows and even change fonts. These options and others are all available under the **Format** tab on the ribbon when you click the **More** button.

Datasheet View will also display related records in an embedded form. For example, an asset will have one or more tasks that are performed on it that create work orders. In Datasheet View, to display the associated tasks of an asset, click the plus (+) sign (also called the expand indicator) in the column to the left of the first column. To return to full Datasheet View, click the minus (-) sign (also called the collapse indicator) in the column to the left of the first column.

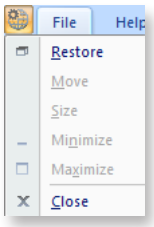
Title Bar

Located at the top of the table, this bar shows the title of the table (**Edit Work Orders** in the example below). To move the window, click this bar and drag the window to a new location.



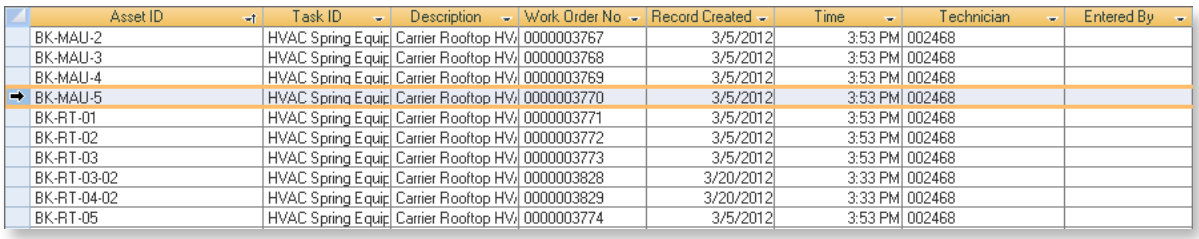
Control Menu Icon

This icon is located to the left of the ribbon. If you click on it once, a menu will appear, allowing you to change the form's size and location. If you double-click on the control icon, it closes the current window.



Record Selector Buttons

Use these small rectangular buttons, located on the far-left side of each row, to select an entire record for subsequent copying or deletion. As you roll the mouse pointer over the button, the pointer will change to an arrow.


Asset ID
Task ID
Description
Work Order No
Record Created
Time
Technician
Entered By
BK-MAU-2 HVAC Spring Equip Carrier Rooftop HV 0000003767 3/5/2012 3:53 PM 002468
BK-MAU-3 HVAC Spring Equip Carrier Rooftop HV 0000003768 3/5/2012 3:53 PM 002468
BK-MAU-4 HVAC Spring Equip Carrier Rooftop HV 0000003769 3/5/2012 3:53 PM 002468
BK-MAU-5 HVAC Spring Equip Carrier Rooftop HV 0000003770 3/5/2012 3:53 PM 002468
BK-RT-01 HVAC Spring Equip Carrier Rooftop HV 0000003771 3/5/2012 3:53 PM 002468
BK-RT-02 HVAC Spring Equip Carrier Rooftop HV 0000003772 3/5/2012 3:53 PM 002468
BK-RT-03 HVAC Spring Equip Carrier Rooftop HV 0000003773 3/5/2012 3:53 PM 002468
BK-RT-03-02 HVAC Spring Equip Carrier Rooftop HV 0000003828 3/20/2012 3:33 PM 002468
BK-RT-04-02 HVAC Spring Equip Carrier Rooftop HV 0000003829 3/20/2012 3:33 PM 002468
BK-RT-05 HVAC Spring Equip Carrier Rooftop HV 0000003774 3/5/2012 3:53 PM 002468

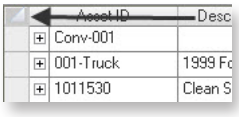
Left-click the mouse button to select the entire record (an orange border will outline the selected record). You can also save record changes. If you changed the record, a pencil icon appears on the button; click it to write your changes to the database.

You can select multiple records by clicking and dragging your mouse pointer over the desired records. To select a large group of records, click on the first record and then hold down the SHIFT key while you click the last record. This function selects both the first and last records and all records in between.

A selector button with an asterisk indicates that a row is a new record position (it's always located at the bottom of the table). *

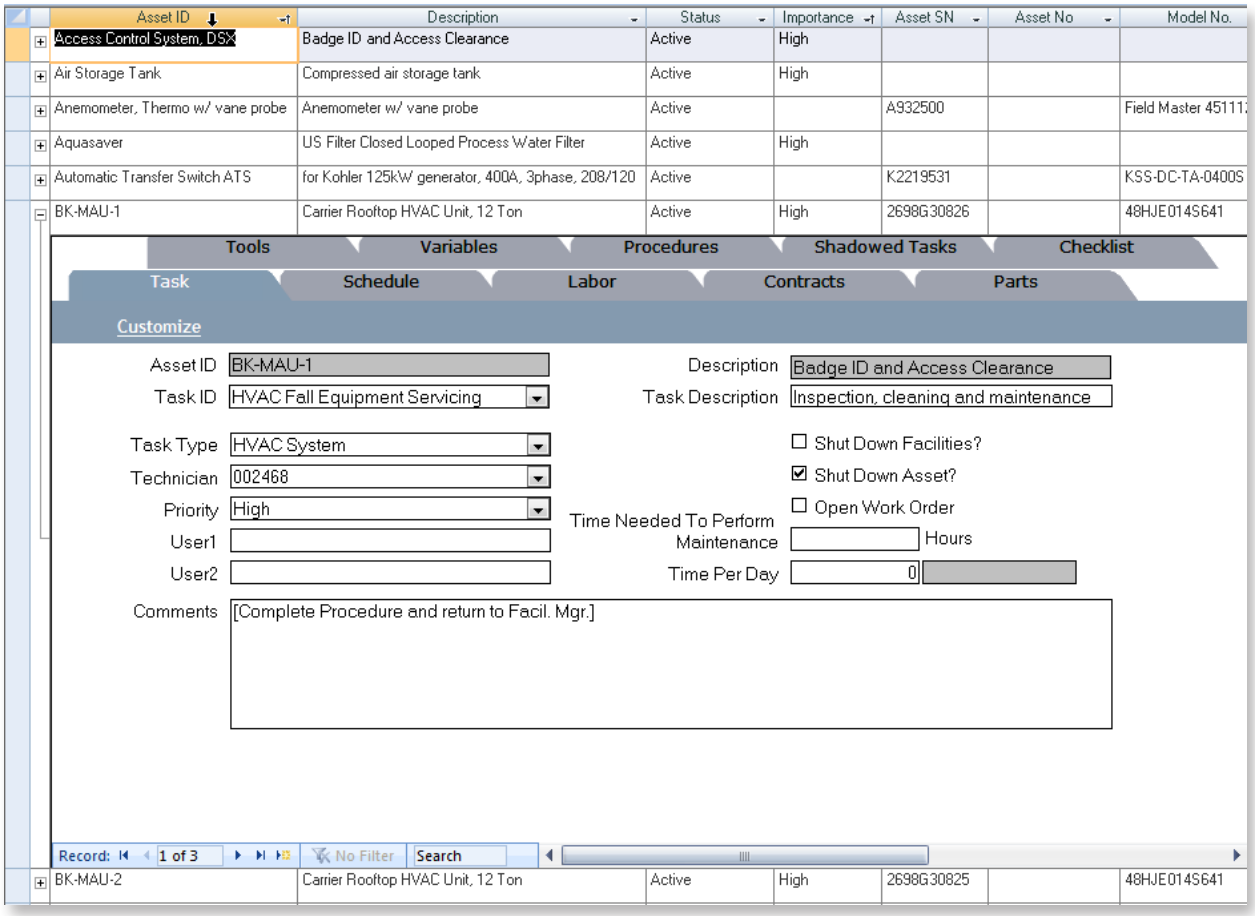
If a record is being used by another user, it is locked and the selector button will have the locked symbol. ⊘

Click the **Select All Records** button, located in the top left corner of the table, to select all records in the table.



Expand a record

Click the **[+]** icon at the left of a record in datasheet view. The **[+]** icon becomes a **[-]** icon and the record expands into form view. Click the **[-]** icon to return to regular datasheet view.



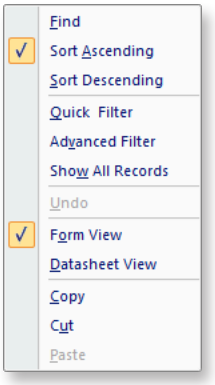
Column (Field) Selector Buttons

Each column header in Datasheet View contains a drop-down list that displays a set of commands. When you point to the drop-down list on the column header and left-click the mouse pointer, you are given sort and filter options that include sorting the data and filtering the data based on specified criteria or based on selection. If you right-click the mouse pointer, you are presented with a shortcut menu to find or sort records, filter the records, undo the last command, switch to Form View or cut, copy or paste data. Each of these commands is described in the sections below.

Note: You cannot copy or move the contents of one column to another column.

Shortcut Menu

Right-click the column header drop-down list to obtain the **Shortcut Menu**. The options available on the shortcut menu are the same options that are available on the shortcut menu when right-clicking anywhere on the form in Form View. These options include: find or sort records, filter records, undo the last command, switch to Form View and cut, copy or paste data.



Find: Search for any phrase, word or part of a word.

Sort Ascending & Sort Descending: Select the column by which you want to sort and then right-click to see the menu; use these commands to sort the data either alphabetically or in reverse-alphabetical order.

Quick Filter: Perform simple searches based on a pre-defined set of criteria.

Advanced Filter: Perform more complex searches on criteria that you select.

Show All Records: If a filter has been set to display a subset of your records, this command resets your display to show all records.

Undo: Remove any modifications to a selected field. If a record is not selected, all modifications made to the current record are removed.

Form View & Datasheet View: Switch between Form View and Datasheet View.

Copy: Copy selected contents to the clipboard.

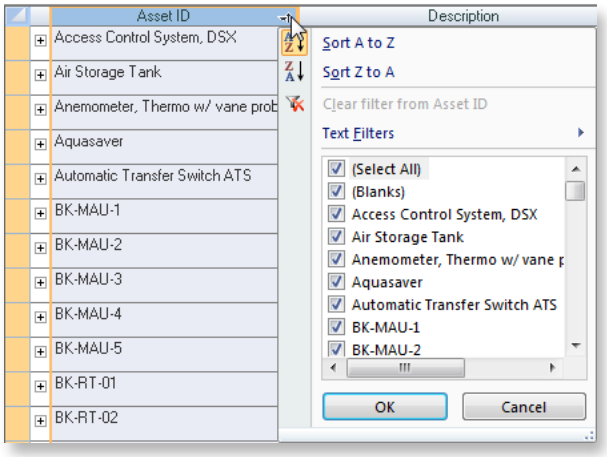
Cut: Delete the selected text and place it on the clipboard.

Paste: Paste the contents of the clipboard into the specified location.

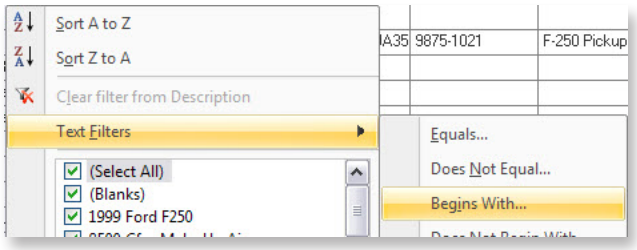
Sort and Filter Options

By default, records in a table are displayed alphanumerically and sorted in ascending order by the ID field values. To reduce the time spent searching for data, FaciliWorks provides several options that will assist you in locating and viewing specified records by arranging data in a specific order. Sorting can be performed on a single field or multiple fields.

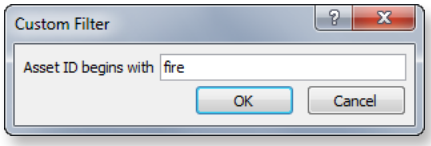
Left-click the column header drop-down list to obtain the sort and filter options. The sort options are the same as those on the **Shortcut Menu**. (Sort A to Z is an alphabetical sort placing numbers before letters, while Sort Z to A is a reverse-alphabetical sort placing numbers after letters.)



Clicking on **Text Filters** brings up another shortcut menu to specify how to filter the data. By selecting one of these options, a dialog box opens, permitting you to type in your criteria.



When filtering data, a subset of the records is displayed while the records that do not match the criteria are temporarily hidden. For example, to filter all records in which the **Description** begins with **Fire**, type Fire in the text box and then click **OK**.



The following records are displayed:

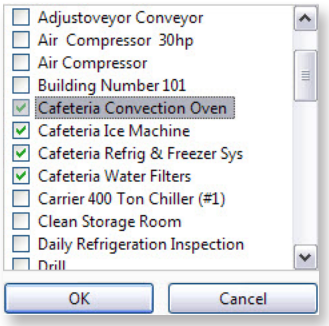
Asset ID	Description	Status	Importance	Asset SN	Asset No
Fire Control System	Main Bldg system	Active	High		
Fire Extinguishers	Fire Extinguisher Annual Inspection	Active	High		
Fire Hydrants (3)	Private Fire Hydrants on property	Active			
Fire Main Back Building	Main back bldg fire system valves	Active			
Fire Main Front Building	Main front bldg fire system valves	Active	High		
Fire System Admin	Policy Reviews	Active			
Fire System Edwards Alarm Panel	Rear building Fire system panel	Active	High		
Fire System FM200 Suppression	Lab 4 RF Room Fire Suppression	Active	High		
Fire-Burg Alarm System-Mich-Obsolete	ADT Alarm System	Scrapped			
		Active			

The **Column Selector** icon in the **Description** column has now changed to a filter icon (see image above) which indicates that the data for this field has been filtered. The **Record Navigation Bar** will also show that the records are filtered.

Also notice that in the example above, the **Importance** field is sorted in ascending order as indicated by the arrow.

To view all records, click the **Column Selector** icon (filter icon) for the **Description** column to display the sort and filter options and then click the **Clear Filter from Description** option or click the **Filtered** button on the **Record Navigation Bar**.

The filter options in the lower portion of the **Sort and Filter Options** menu contain a list of the column contents with a checkbox to the left of each record item. You can manually select the records that you want to display. For example, the records here show the contents of the **Description** column. When first opened, all records are selected to display in the datasheet. Uncheck the **Select All** box. All records are now deselected. Check each box of the records you wish to display.



Checking the four Cafeteria records and then clicking **OK** will result in the following display:

Asset ID	Description	Status	Importance
Cafe Refrig	Cafeteria Refrig & F	1	Medium
Cafe Oven	Cafeteria Convectic	1	Medium
Cafe Ice Mach	Cafeteria Ice Mach	1	Medium
Cafe Filters	Cafeteria Water Filt	1	Medium
		1	

To view all records, click the **Column Selector** icon (filter icon) for the **Description** column to display the sort and filter options and then click the **Clear Filter from Description** option.

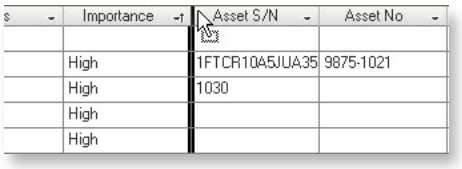
Rearranging Columns

In Datasheet View, the record fields are displayed in a single row making it necessary to scroll the form to the right to view all fields. FaciliWorks allows you to reposition the field/columns that you view most often. The new column position can be saved so that each time you switch to Datasheet View, the columns will be in the position that you prefer. This repositioning of the columns does not globally change the database, nor does it affect the display of the fields in Form View; it affects only the display of Datasheet View on your desktop.

Follow these steps to reposition the columns in Datasheet View. For this example, move the **Type** column to the right of the **Importance** column in the sample below.

Click the header of the column that you want to move, i.e., the **Type** column. This will select the entire column of data. Release the mouse.

Click and hold the left mouse button and drag the **Type** column header to the right of the **Importance** column. A thick black line appears between columns as you drag the mouse pointer, indicating the new position:



Release the mouse. The **Type** column is now to the right of the **Importance** column.

Format Tab

Several other column options are available in Datasheet View, such as hiding columns, changing row and column height and freezing columns. These options are available on the **Format** tab. The **Format** tab includes options to design the layout of your records in Datasheet View.

Set Label Font: Modify the font type of the labels.

Row Height: Change the row height for multiple records and specify standard height.

Column Width: Change the column width for multiple records and specify standard width.

Hide Columns: Temporarily hide specified columns from the display.

Unhide Columns: Show specified columns.

Freeze: Freeze columns/rows in place so that they remain in view as you are scrolling through the table.

Unfreeze: Set all columns to move freely as you scroll through the table.

Gridlines: Set the gridlines to display on the table.

Width, Style and Color: Set the width, style and color of the gridlines that are displayed on the table.

Hide and Display Columns

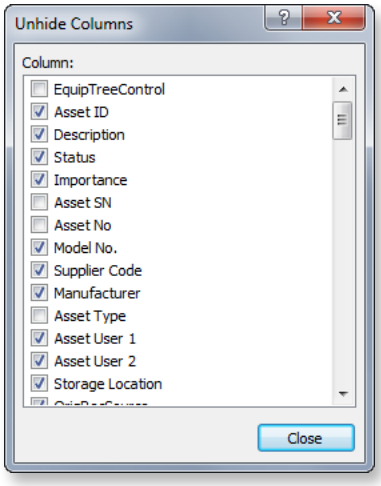
You can temporarily hide columns while in Datasheet View. This allows you to remove nonessential data from the form and reduce the report's width when you're designing a custom report.

To hide columns, click anywhere in the column or click the header of the column(s) you want to hide. To hide multiple columns, click and drag across the column headers. In the example below, we want to hide the three highlighted columns.

Asset Type	Asset S/N	Asset No	Model No.	Supplier Code
Vehicle	1FTCR10A5JUA35	9875-1021	F-250 Pickup	Jones Ford
Classed Area	1030			
70				0
Electric				
HVAC/Refrigeration	A97004910		8500dd 1sp	American Comfort F

From the **Format** tab, click **Hide Columns**. The three columns are temporarily hidden from the display.

To display hidden columns, click the **Format** tab and click **Unhide Columns**. A dialog box appears listing all columns. Following our example, you can see that the three columns that we just hid from view are unchecked:



Place a check in the box beside the name of each column you want to display. Each column will reappear as you check the box beside its name; if you uncheck a box, the corresponding column will disappear from Datasheet View.

When you've selected the columns you want, click **Close**.

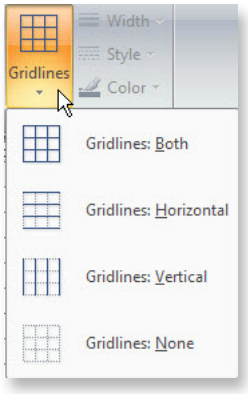
Freeze Columns

To prevent columns from scrolling off the form, select **Freeze** from the **Format** tab to hold the selected columns in place as you scroll left and right. For example, place the cursor in the first row of the first column (001-Truck). On the **Format** tab, click **Freeze**. As you scroll to the right, the **Asset ID** column remains visible. This is very helpful when viewing records after the first form of data – the column header and **Asset ID** you are viewing will remain visible.

To unfreeze the columns, click the **Format** tab and then click **Unfreeze**.

Hide and Display Gridlines

By default, the program displays gridlines around each cell in Datasheet View. To hide gridlines, go to the **Format** tab and choose **Gridlines**.

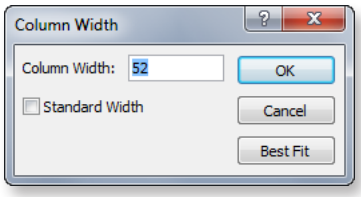


A shortcut menu will appear; use the options in this menu to display or hide gridlines.

There are three other formatting options in the Gridlines group: Width, Style and Color. Each refers to the lines of the grid and has a drop-down list of options.

Change Row Height and Column Width

To change the height of all rows or the width of selected columns, select **Row Height** or **Column Width** respectively from the **Format** tab. Each option allows you to type in a value. Check the **Standard Height** or **Standard Width** checkbox to display the default height/width. The column width option includes a **Best Fit** alternative; FaciliWorks will automatically size the column to the longest text in the field.



Naming Conventions

A primary key field is a field that contains unique values which are used to identify each record, i.e., Asset ID, Task ID, etc. Key identifiers are used to establish appropriate relationships between the data tables. There are certain restrictions when entering data into the record ID fields:

- ID fields must not be blank.
- ID values must be unique for each record; ID values cannot be duplicated in another record.
- ID fields can contain letters, numbers and dashes (-).

Avoid using / # * ? ! ‘ [ ] or any other special characters in your ID field or other fields, as FaciliWorks considers them to be wildcard characters (wildcards help you search and filter records and set numbering formats. (See **Supported Wildcard Characters in Search Fields**.) If you must use these characters, such as in “Boiler #1”, then you must put brackets around the wildcard character whenever you use it to filter records, for example, enter “Boiler [#] 1.”

Filtering Records

Supported Wildcard Characters in Search Fields

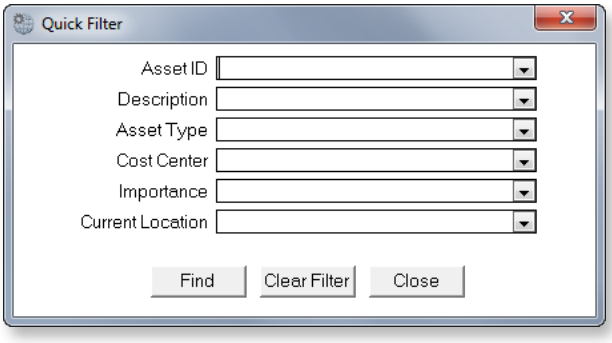
Within any FaciliWorks data entry window, you must set a unique identifier for the records (see **Naming Conventions**). The asterisk (*), question mark (?), number sign (#), exclamation point (!) and brackets ([ ]) are all wildcard characters that cannot be used in setting the identifier as these characters are used by FaciliWorks for other functions. You can use them in record and report filters and in **Find/Replace** commands to include all records that begin with specific characters or match a certain pattern.

Wildcard	Enter	Result
*	wh*	what, white, why
	*at	cat, bat, what
	//09	any date in 2009
	11/*/*	any date in November
?	b?ll	ball, bill, bell
#	1#3	103, 113, 123, etc.
[ ]	b[ae]ll	ball, bell – any single character within the brackets
	bell [#]	bell #1 – a literal search to find records that contain the wildcard character #
!	b[!ae]ll	bill, bull – characters not shown in the brackets
-	b[a-c]d	bad, bbd, bcd – any characters within the range shown in the brackets

Quick Filter

Use the **Quick Filter** command to quickly find records based on a simple search using one or more of a predefined set of fields. The **Quick Filter** feature recognizes wildcard characters. There are two ways of calling/invoking this feature:

1. Access **Quick Filter** from the **Records** tab, in the **Filter** group on the ribbon.
2. Right-click the mouse button anywhere on the form to show the shortcut menu; select **Quick Filter**.



To use the **Quick Filter**, follow these instructions:

1. Call the **Quick Filter** using the **Records** tab or the shortcut menu as described above. The **Quick Filter** is displayed showing a list of search fields.
2. Use the drop-down list to select the value from the database or type the value you wish to find in the appropriate text box. If the value you are typing is in the database, the text box auto-fills the remaining characters.
3. To restrict the search, use more than one field in your search criteria. For a more general search, use only one criterion. To show all records, leave all fields blank.
4. Once you have made your selections, click **Find**. FaciliWorks will locate the first record in the resulting search and display it either on the form (Form View) or will point to it on the datasheet (Datasheet View).
5. To perform a different search, click the **Clear Filter** button and make another selection. When you are finished with the **Quick Filter**, click **Close**.

Advanced Filter

Use the **Advanced Filter** command to locate a very specific record or group of records. With this command, you can set up a customized search filter for your records; you can search by all fields in the form. Access the **Advanced Filter** from the right-click shortcut menu or from the **Records** tab. With the **Advanced Filter**, you create the criteria for your result.

The **Advanced Filter** fields and buttons function as follows:

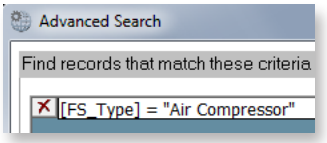
Find records that match these criteria: This box in the upper portion of the **Advanced Filter** window displays a list of all defined criteria.

New: Creates a new filter name.

Open: Opens a list of previously saved search criteria.

Save: Saves search criteria so that you don't have to set up the same searches repeatedly. To do so, click the **Save** button after you enter your criteria. The program asks you to create a descriptive name for each search. Later, when you want to use this search again, select **Advanced Filter** and then click the **Open** button to retrieve your saved search.

Delete: Each criterion listed in the upper section of the **Advanced Filter** has a button to the left marked with a red X. Click the X button to delete that particular criterion from the list.



And and **Or** radio buttons: When defining criteria, use these buttons to connect criteria. Use **And** if both premises must be true; use **Or** if only one premise must be true. Be sure to select **And** or **Or** before adding another criterion.

Add to List: Adds your defined criteria to the criteria list.

Field: This drop-down list shows all the fields you can search. Field names appear as column headings in the data grid.

Condition: This drop-down list shows the field operators you can use to create search criteria:

- contains: The value listed is a subset or is part of the search field.
- begins with: The search field begins with the value listed.
- ends with: The search field ends with the value listed.
- is between inclusive: The value listed is within the contents of the search field from the first to the last entries.
- is between exclusive: The value listed is between the first and the last entry of the search field.
- not like: The value listed is not a subset of or is not part of the search field.
- = The search field matches the value listed exactly.
- <> The search field is not equal to the value listed.
- < The search field is less than the value listed.
- > The search field is greater than the value listed.
- <= The search field is less than or equal to the value listed.
- >= The search field is greater than or equal to the value listed.
- Is & Is Not: This works only in conjunction with the Null value (empty field).

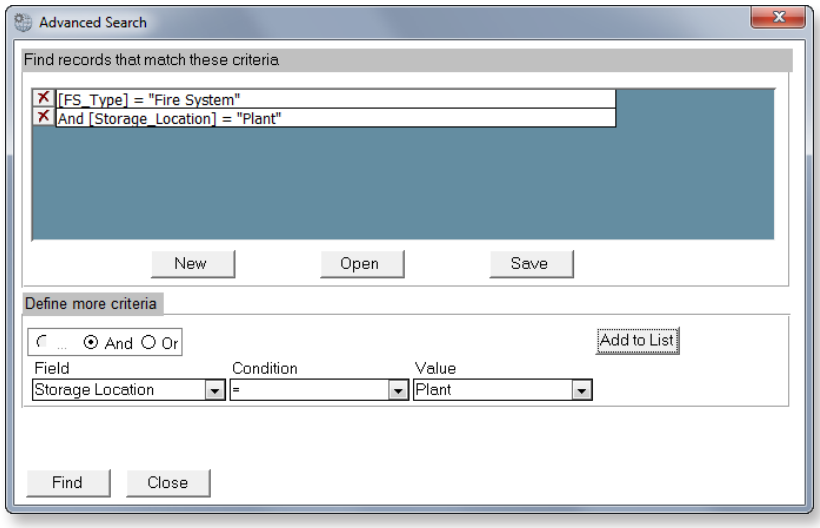
Value: Enter a value to be used in your search. Values may be letters and/or numbers or a date; however, the **Value** field will not permit you to enter letters in a numeric field. It will also allow only dates in a date field. Entry conventions are described elsewhere.

Find: Displays all records that meet the specified criteria.

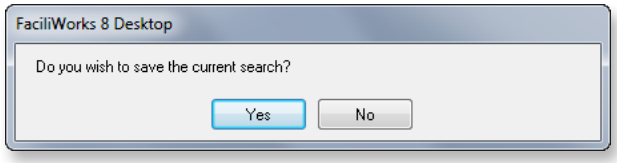
Close: Closes the **Advanced Filter** window.

Advanced Filter Example

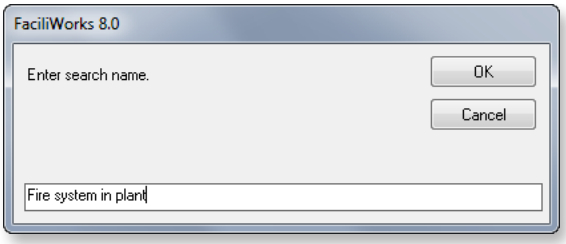
1. Use the drop-down lists on the **Field**, **Condition** and **Value** text boxes to select your choices or type in your values.
2. Click the **Add to List** button to place the criterion in the criteria box in the upper portion of the filter window. Select the appropriate **And/Or** condition and then continue adding criteria. Click **Find** to start the search.



3. You will be prompted to save the search criteria. (To save your filter before starting the search, click the **Save** button.)



4. If you click **Yes** in the message above, the **Advanced Search Save** dialog box will open. Your filter will be saved by giving it a name. If you select **No**, the search results will be displayed.



5. Type the search name and then click **OK**. Your search results are then displayed.
6. Your named filter can be launched by first starting the **Advanced Filter**. When the advanced filter opens, click the **Open** button.
7. Select the named filter of your choice and then click **Select**. Click the **Find** button on the **Advanced Search** window. FaciliWorks displays the results of the search.
8. When you are finished using the **Advanced Filter**, click **Close**.

Editing and Shortcut Keys

The following tables list keyboard shortcuts that save time when entering data into the database.

Note: When <CTRL> or <SHIFT> is indicated, hold down the key while pressing the subsequent keystroke.

Keyboard Shortcuts – General

Keystroke	Description
Page Down	Go to the next record in Form View; next page of records in Table view.
Page Up	Go to the previous record in Form View; previous page of records in Table view.
<CTRL> '	Copy field data from the previous record's field.
<CTRL> ;	Insert the current date.
<CTRL> :	Insert the current time.
<CTRL> *	Add a new record.
<SHIFT> <ENTER>	Save changes to the current record.
<CTRL> -	Delete the current record.
<CTRL><ENTER>	Add a new line to a memo field.
F2	Switch between field editing and navigation modes.
F5	Move to the record ID entry text box.
<SHIFT> Space	Select the current record.

Field Editing and Selection Keys

Keystroke	Description
<SHIFT> Right Arrow	Extend the selection or deselect one character to the right.
<CTRL> <SHIFT> Right Arrow	Extend the selection or deselect one word to the right.
<SHIFT> Left Arrow	Extend the selection or deselect one character to the left.
<CTRL> <SHIFT> Left Arrow	Extend the selection or deselect one word to the left.
<CTRL> C or <CTRL> Insert	Copy the selected text into the Windows Clipboard.
<CTRL> V or <SHIFT> Insert	Paste text from the Windows Clipboard.

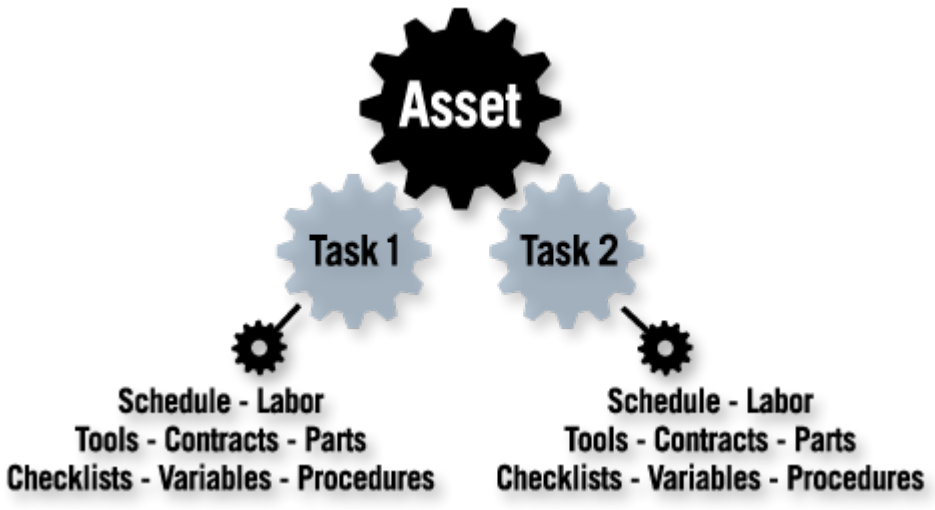
Datasheet View (Table) Keyboard Shortcuts

Keystroke	Description
<TAB> / <ENTER> / or Right Arrow	Move to the next field.
<END>	Move to the last space in the current field.
<SHIFT><TAB> or Left Arrow	Move to the previous field.
<HOME>	Move to the first character in the current field.
Down Arrow	Move to the current field in the next record.
<CTRL> Down Arrow	Move to the current field in the last record.
<CTRL> <END>	Move to the last space in the current record.
Up Arrow	Move to the current field in the previous record.
<CTRL> Up Arrow	Move to the current field in the first record.
<CTRL> <HOME>	Move to the first field in the first record.

Chapter Four:
Entering Data for Preventative Maintenance

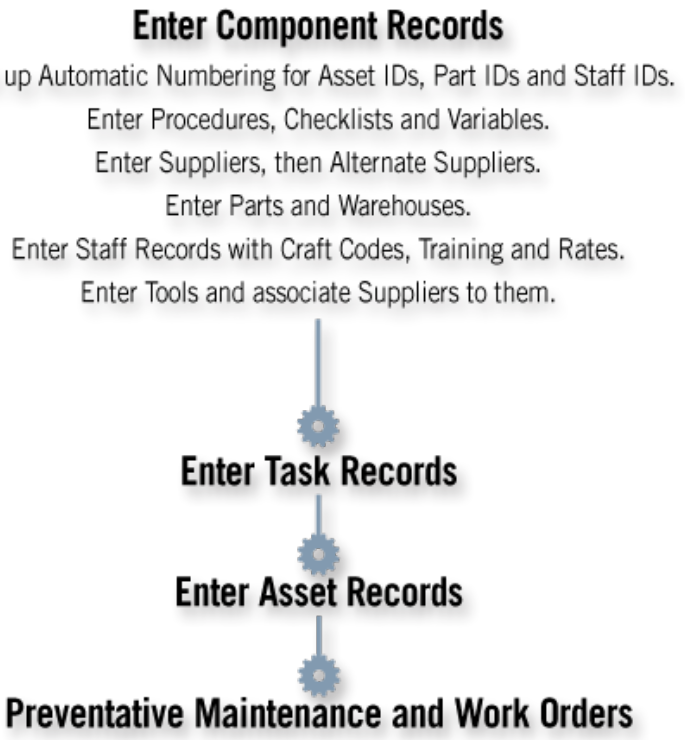
Data Flow and Implementation Strategies

This diagram shows how records are arranged in FaciliWorks. Each asset may have one or more tasks that are performed on it for preventative maintenance. The task is comprised of a number of components needed to complete the task.



To help you quickly get started with FaciliWorks and to evaluate and use its major functions, this chapter provides instructions for entering only basic preventative maintenance information which includes asset and task information. For full instructions on each of the data entry screens, proceed to the appropriate chapters.

To have the data available to create preventative maintenance and work orders easily and efficiently, it is best to follow a process. To make all data available for asset records, enter the component information first. We start by entering all task component data as shown on the following flowchart. Once the task components are entered, we can then associate the components to the task. The task can then be associated to the asset. When all information is entered for the asset, we can create scheduled preventative maintenance and unscheduled work orders for the asset.


Enter Component Records
Set up Automatic Numbering for Asset IDs, Part IDs and Staff IDs.
Enter Procedures, Checklists and Variables.
Enter Suppliers, then Alternate Suppliers.
Enter Parts and Warehouses.
Enter Staff Records with Craft Codes, Training and Rates.
Enter Tools and associate Suppliers to them.
Enter Task Records
Enter Asset Records
Preventative Maintenance and Work Orders

Automatic Numbering

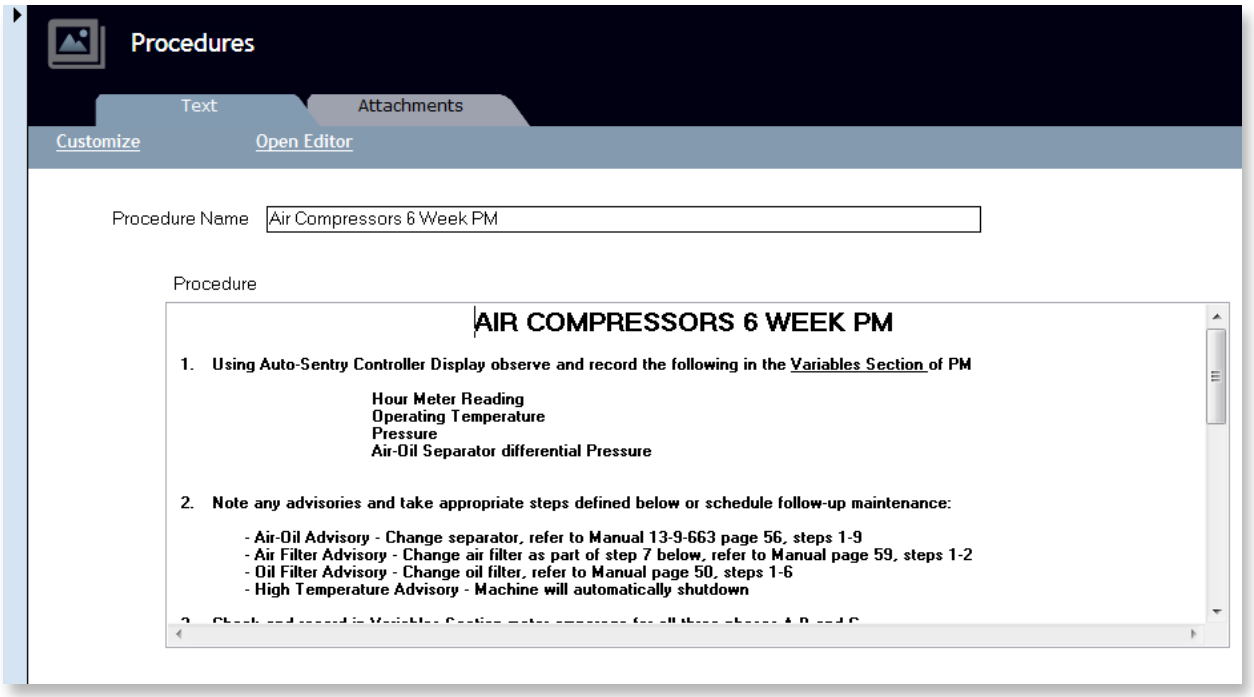
Please see **Chapter Thirteen: Setup -> Settings -> Auto Numbering** tab.

Procedures

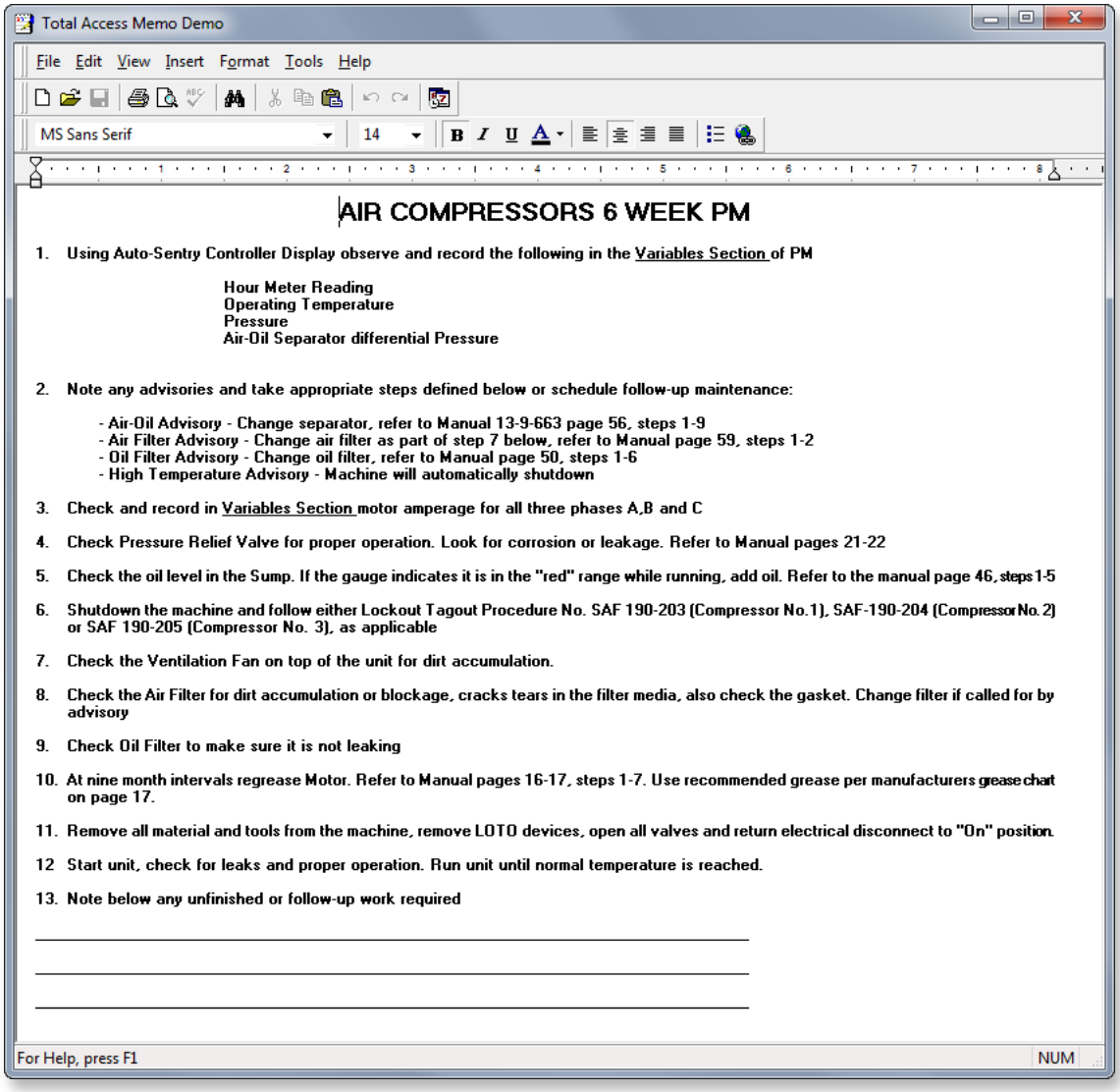
To get started, focus on the fields described below. For more information, please see **Procedure Entry** in **Chapter Five**.

Procedures – Text Tab

In the **Procedures** window, you can create a process to follow for completing a task. From the Main Menu, select **Data Administration** and then click **Procedures** (**Main Menu -> Data Administration -> Procedures**). To add a new procedure, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form. Each procedure must have a unique **Procedure Name**.


Procedures
Text
Attachments
Customize
Open Editor
Procedure Name
Air Compressors 6 Week PM
Procedure
AIR COMPRESSORS 6 WEEK PM
1. Using Auto-Sentry Controller Display observe and record the following in the Variables Section of PM
Hour Meter Reading
Operating Temperature
Pressure
Air-Oil Separator differential Pressure
2. Note any advisories and take appropriate steps defined below or schedule follow-up maintenance:
- Air-Oil Advisory - Change separator, refer to Manual 13-9-663 page 56, steps 1-9
- Air Filter Advisory - Change air filter as part of step 7 below, refer to Manual page 59, steps 1-2
- Oil Filter Advisory - Change oil filter, refer to Manual page 50, steps 1-6
- High Temperature Advisory - Machine will automatically shutdown

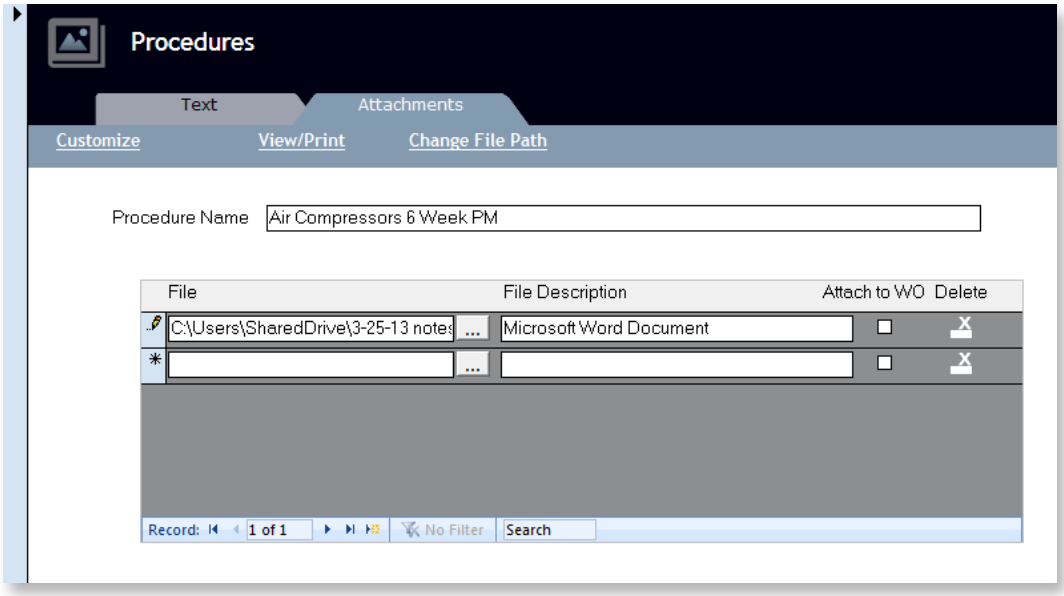
You can enter the procedure text in one of three ways; type the procedure directly into the text box provided, cut and paste from an existing procedure text file or use the editor for more formatting options. To use the editor, click the **Open Editor** button on the **Text** tab. You can type the procedure directly into the editor or cut and paste from an existing text file.


Total Access Memo Demo
File Edit View Insert Format Tools Help
MS Sans Serif
14
AIR COMPRESSORS 6 WEEK PM
1. Using Auto-Sentry Controller Display observe and record the following in the Variables Section of PM
Hour Meter Reading
Operating Temperature
Pressure
Air-Oil Separator differential Pressure
2. Note any advisories and take appropriate steps defined below or schedule follow-up maintenance:
- Air-Oil Advisory - Change separator, refer to Manual 13-9-663 page 56, steps 1-9
- Air Filter Advisory - Change air filter as part of step 7 below, refer to Manual page 59, steps 1-2
- Oil Filter Advisory - Change oil filter, refer to Manual page 50, steps 1-6
- High Temperature Advisory - Machine will automatically shutdown
3. Check and record in Variables Section motor amperage for all three phases A,B and C
4. Check Pressure Relief Valve for proper operation. Look for corrosion or leakage. Refer to Manual pages 21-22
5. Check the oil level in the Sump. If the gauge indicates it is in the "red" range while running, add oil. Refer to the manual page 46, steps 1-5
6. Shutdown the machine and follow either Lockout Tagout Procedure No. SAF 190-203 (Compressor No.1), SAF-190-204 (Compressor No. 2) or SAF 190-205 (Compressor No. 3), as applicable
7. Check the Ventilation Fan on top of the unit for dirt accumulation.
8. Check the Air Filter for dirt accumulation or blockage, cracks tears in the filter media, also check the gasket. Change filter if called for by advisory
9. Check Oil Filter to make sure it is not leaking
10. At nine month intervals regrease Motor. Refer to Manual pages 16-17, steps 1-7. Use recommended grease per manufacturers grease chart on page 17.
11. Remove all material and tools from the machine, remove LOTO devices, open all valves and return electrical disconnect to "On" position.
12 Start unit, check for leaks and proper operation. Run unit until normal temperature is reached.
13. Note below any unfinished or follow-up work required
For Help, press F1
NUM

Close the editor to return to the **Procedures** form.

Procedures – Attachments Tab

Images, maps, spreadsheets and other files can be attached to your procedures. Click the **Attachments** tab.

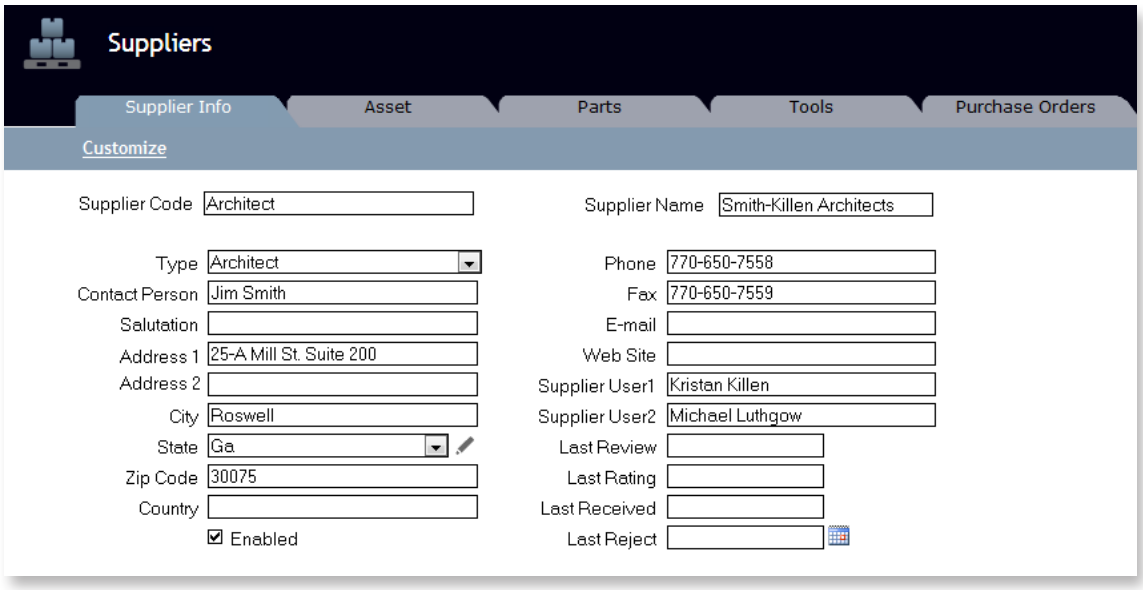


To attach a file, click the browse button **[...]**. Navigate to the location of the file and select it. FaciliWorks will add the file path and file description. There is no limit to the number of files you can attach to a procedure. Click the **Attach to WO** checkbox to allow your attachments to be printed along with your work orders. To view or print attached files, click the **View/Print** button.

To close the procedure window, click the **File** tab on the ribbon at the top of the form and then click the **Close** button.

Suppliers – Supplier Info Tab

Before you add data to assets, parts, tools or services, any vendor/supplier data must be entered. Navigate to the **Data Administration -> Suppliers -> Supplier Info** tab. To get started, focus on the fields on the **Supplier Info** tab described below. For more information, please see **Supplier Entry** in **Chapter Five**.



To add a new supplier, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form. The **Supplier Code** must be a unique ID that identifies the supplier. The name can be more descriptive and can contain up to 255 characters. The record will not be saved if either of these two fields is missing data. If this is an active supplier, be sure to check the **Enabled** checkbox on the bottom of the form.

If you are no longer doing business with this supplier, it is best to uncheck the **Enabled** box rather than delete the supplier from your database. Deleting the supplier will cause a cascade deletion of all associated records that are attached to the supplier and will result in loss of information from your database.

Supplier Code: A unique alphanumeric identification code for each supplier.

Supplier Name: The supplier company name.

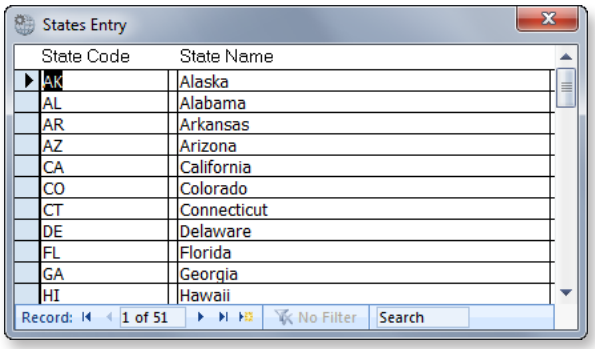
Type: Select the supplier type from the drop-down or enter a new type to add to the list.

Contact Person: The name of the person to contact.

Salutation: Mr., Ms., Mrs., etc. If you leave this field blank, FaciliWorks will direct your correspondence to the name of the contact person (for example, Joe Smith instead of Mr. Joe Smith).

Address, City, State, Zip and **Country**: Enter the supplier's address in the appropriate fields. To modify or add to the states dropdown list, click the pencil button to the right of the drop-down button:

The **States Entry** form will appear:



Modify an item by overwriting the current field contents or create a new record by clicking the **New Blank Record** button on the **Record Navigation Bar**.

Phone and **Fax**: The supplier's telephone and fax numbers.

Email, **Web Site**: The supplier's email address and web site.

Enabled: Check this box to indicate that this supplier is currently active. Only enabled suppliers appear on lists of available suppliers.

Supplier User 1 and **Supplier User 2**: Use these fields to store additional information about each supplier not on the form that you consider useful.

Last Review: The date of the last review for this supplier.

Last Rating: The date of the last rating of this supplier.

Last Received: The date of the last shipment you received from this supplier.

Last Reject: The date of the last time you rejected parts from this supplier.

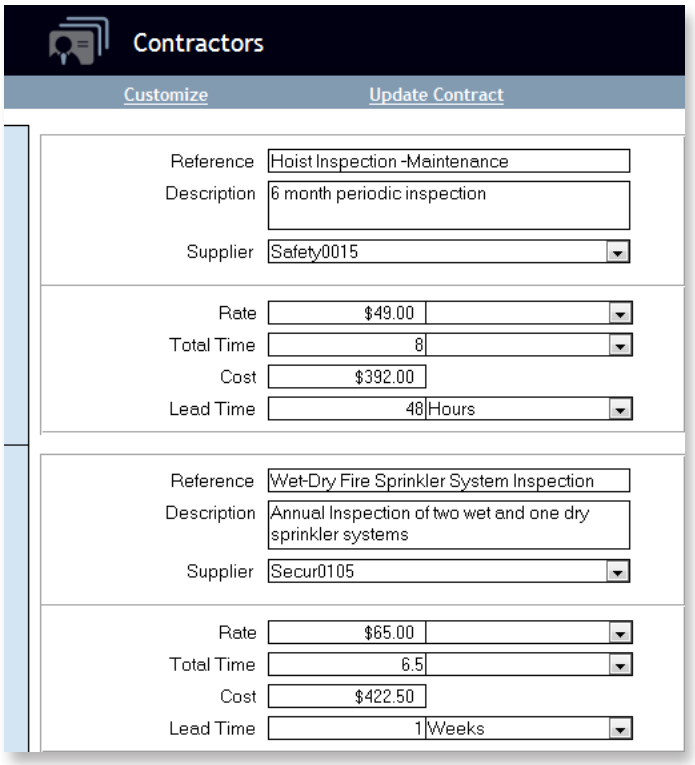
Suppliers – Asset, Parts, Tools and Purchase Orders Tabs

These tabs will auto-fill as those components are entered into the database.

Contractors

To get started, focus on the fields described below. For more information, please see **Contractor Entry** in **Chapter Five**.

In the **Contractors** window, you will add information about outside services or consultants. Navigate to **Data Administration -> Contractors**. To add a new contractor, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form. This adds a blank section of fields to the bottom of the form to add a new contractor record. As you add a new record, an additional section of blank fields will appear beneath it.



Identify each contractor with a unique **Reference** ID. Enter the description next. You can now use the **Supplier** drop-down list to select supplier information. Recall that we entered supplier records prior to this step. Had we not completed that step first, we would not have any choices in this drop-down list.

Next, in the **Rate** fields, type the pay rate and select the increment on the rate drop-down list (hours/days/weeks). The **Cost** field will auto-fill.

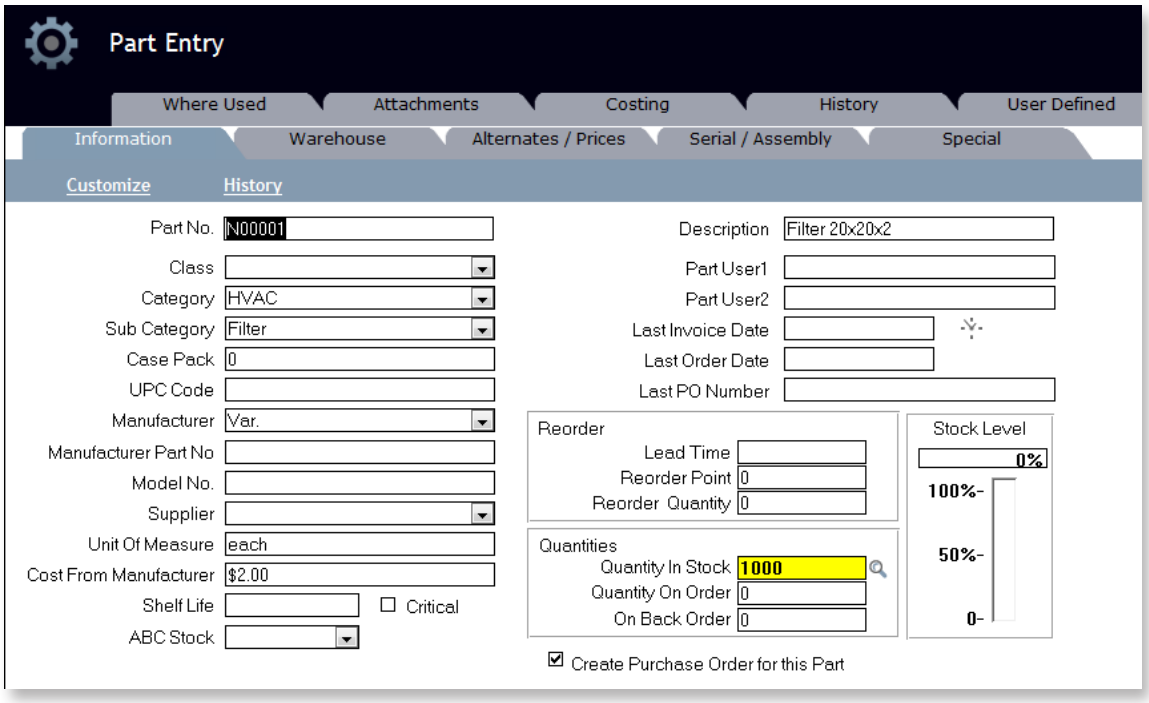
Lead Time is the amount of notice needed for providing the service.

Inventory

You can easily maintain up-to-date inventory records for your suppliers and assets. You can also track the cost of parts and supplies that are used during maintenance. From the Main Menu, navigate to **Spare Parts Inventory -> Part Entry**.

Part Entry – Information Tab

To add a new part, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form.



To get started, focus on the fields on the **Information** tab described below. For more information, please see **Chapter Eight: Spare Parts Inventory**.

Part No.: Create a unique alphanumeric identifier for each part.

Description: Enter a brief description of the part.

Supplier: Use the drop-down list to select the supplier for this part.

Unit of Measure: Unit by which the part is purchased (each, pack, gallon, pound, case, etc.).

Cost from Manufacturer: In this field, enter the part's current price. **Important: enter this value before entering quantities.**

ABC Stock: Categories of importance for keeping stock on hand.

Reorder Point: Minimum quantity in stock before reordering this part.

Quantity in Stock: Current quantity on hand. After you first enter this record, FaciliWorks will update it automatically, based on your work order and purchase order records.

Quantity on Order: This field shows the quantity currently on order based on purchase order records.

On Back Order: This field shows the quantity back-ordered based on purchase order records.

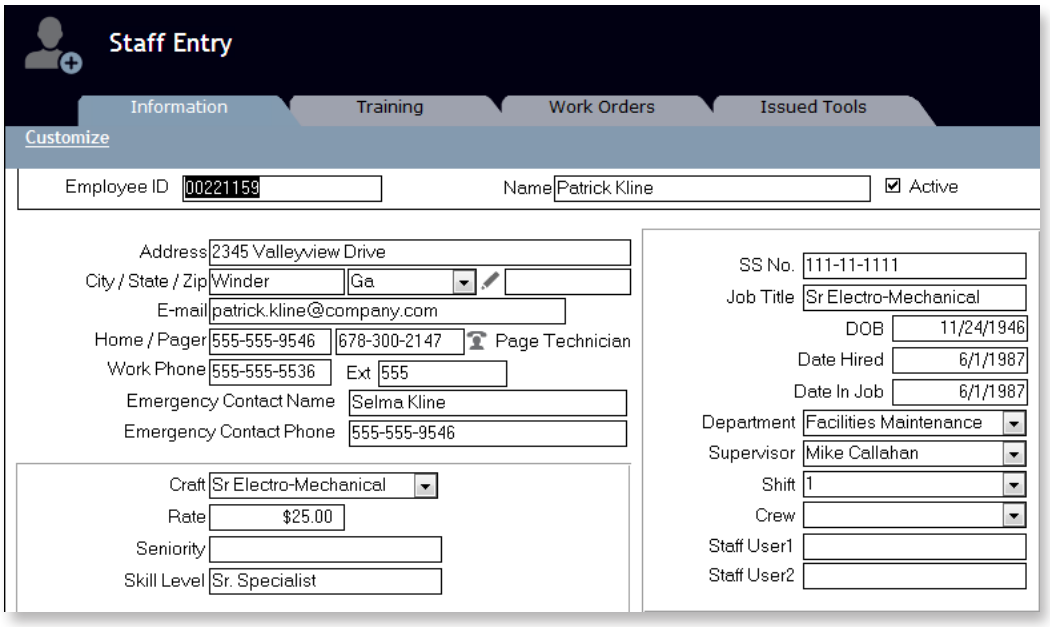
Create Purchase Order for this Part: When this box is checked, FaciliWorks will automatically create a notification that the part has fallen below its reorder point and a purchase order should be created.

Personnel

Navigate to **Personnel -> Staff Entry**. Detailed employee records for your maintenance staff are entered and viewed here. Employee training information, assigned work orders and tools issued are tracked here as well. To get started, focus on the fields described below. For more information, please see **Chapter Nine: Personnel**.

Staff Entry – Information Tab

To add a new employee, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form.



The fields on the left side of the form are typically completed. You may want to remove sensitive information, such as **SS No.** from the right side of the form or restrict access to these fields by changing security settings. For information about setting security permissions, please see **Chapter Nine: Personnel -> Security**.

Employee ID: Enter a unique alphanumeric identifier.

Name: Enter the employee's full name.

Active: By default, this checkbox is checked. If not checked, the employee will not appear on reports or drop-down lists. Rather than delete an employee, uncheck this checkbox to make the employee inactive – this retains all associated records.

Email: Enter the employee's email address – this is important if you are going to use the **Automatic Email** feature.

Craft: Categorize workers by profession such as a description, code or number classification.

Rate: Enter the employee's hourly rate. FaciliWorks uses this rate to calculate the cost of maintenance based on actual hours performed.

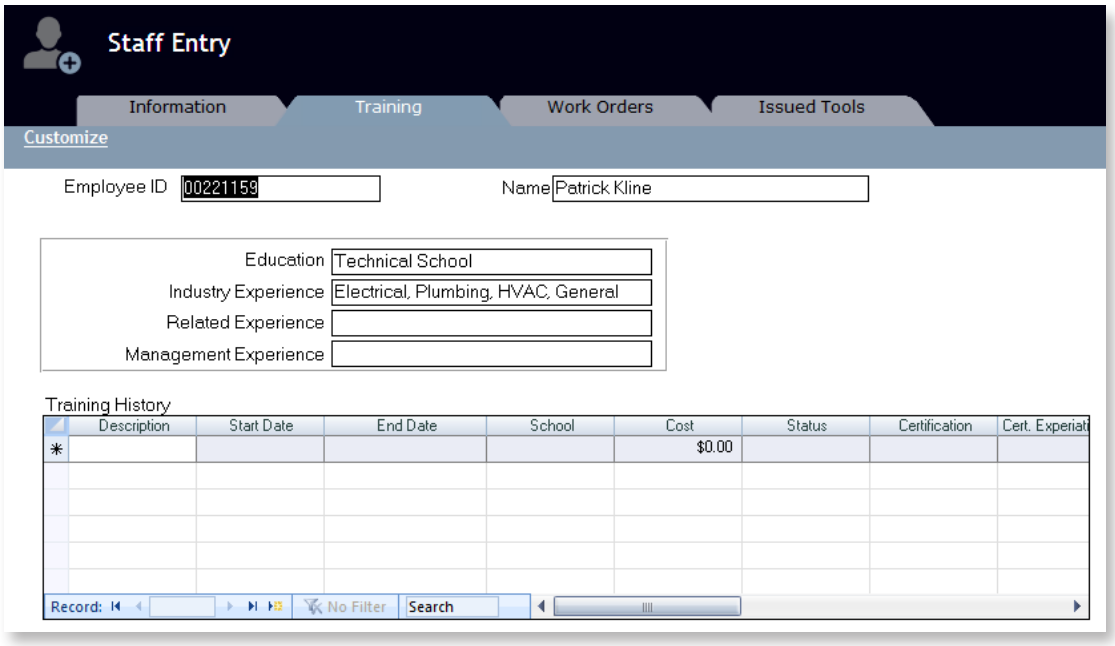
Seniority: Enter the work status of the employee or the date that determines seniority.

Skill Level: An internal or external classification system can be used to assign skill level.

Staff User 1 and **Staff User 2**: Used to store any additional information. Labels can be customized.

Staff Entry – Training Tab

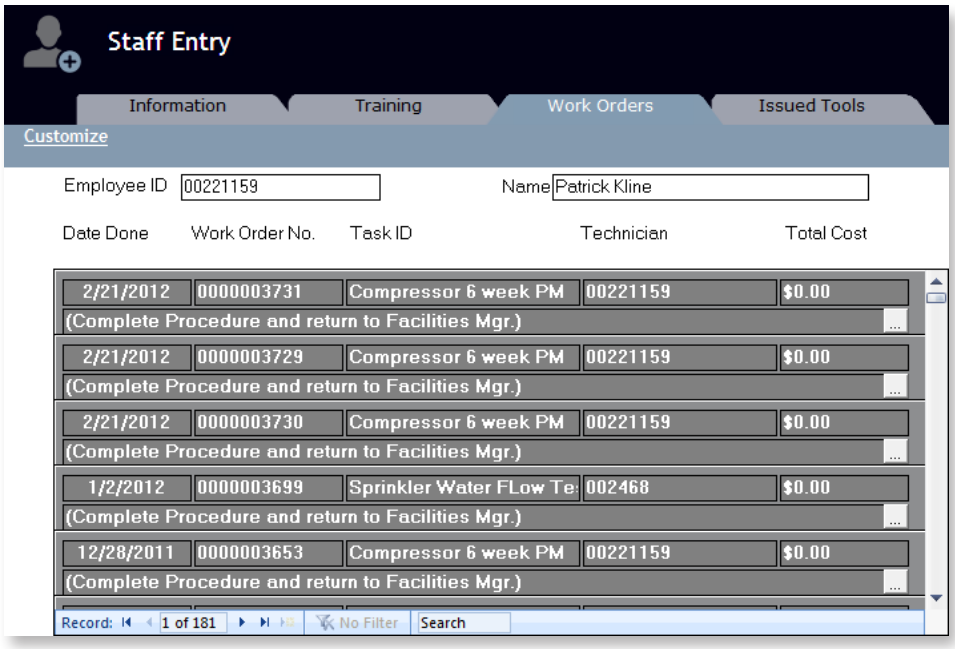
The fields on the **Training** tab are used to keep track of the employee's current and continuing education.



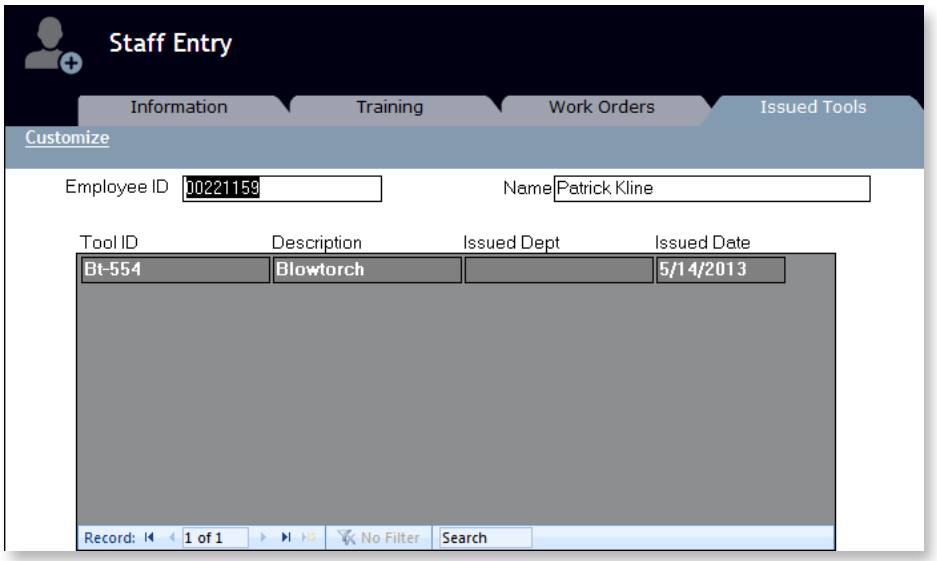
Use the scroll bar at the bottom of the **Training History** pane to move the form to the left and display more fields.

Staff Entry – Work Orders and Issued Tools Tabs

These tabs are auto-filled as the employee is assigned work and issued tools. The **Work Orders** tab displays work orders completed by the employee. **Date Done**, **Work Order Number**, **Task Completed**, **Technician** supervising the work and **Total Cost** applied are reported here.


Staff Entry
Information
Training
Work Orders
Issued Tools
Customize
Employee ID 00221159
Name Patrick Kline
Date Done
Work Order No.
Task ID
Technician
Total Cost
2/21/2012 0000003731 Compressor 6 week PM 00221159 $0.00
(Complete Procedure and return to Facilities Mgr.)
2/21/2012 0000003729 Compressor 6 week PM 00221159 $0.00
(Complete Procedure and return to Facilities Mgr.)
2/21/2012 0000003730 Compressor 6 week PM 00221159 $0.00
(Complete Procedure and return to Facilities Mgr.)
1/2/2012 0000003699 Sprinkler Water FLow Te 002468 $0.00
(Complete Procedure and return to Facilities Mgr.)
12/28/2011 0000003653 Compressor 6 week PM 00221159 $0.00
(Complete Procedure and return to Facilities Mgr.)
Record: 1 of 181
No Filter
Search

The **Issued Tools** tab displays all tools that were issued to the employee to complete a task. To see if this tool was returned to the tool crib, please see **Tool Entry**.

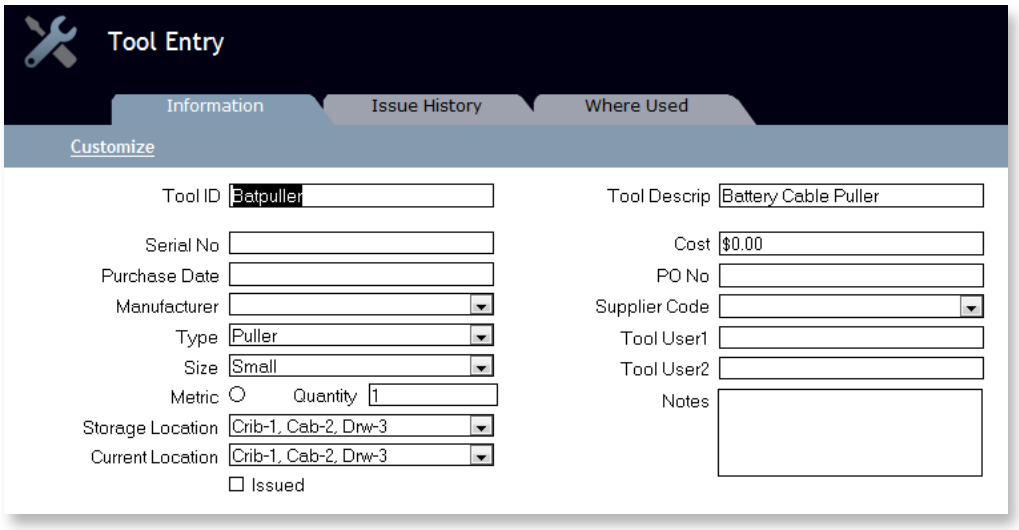


Tools

If you keep track of tools, you can enter and edit tool records including each tool's usage history. Navigate to **Tools -> Tool Entry**.

Tool Entry – Information Tab

To add a new tool record, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form.



For now, enter information into the following fields to quickly create your new tool record. For more information, please see **Chapter Ten: Tools**.

Tool ID: Enter a unique alphanumeric ID code for the tool.

Tool Description: Enter a description of the tool.

Type: Because you can use this field to filter your tool records, enter tool types consistently. To make it easier to do so, when you enter a new tool type, FaciliWorks adds it to the drop-down list so you can select it for future tool records.

Quantity: If this tool is part of a set, enter the number of pieces in the set.

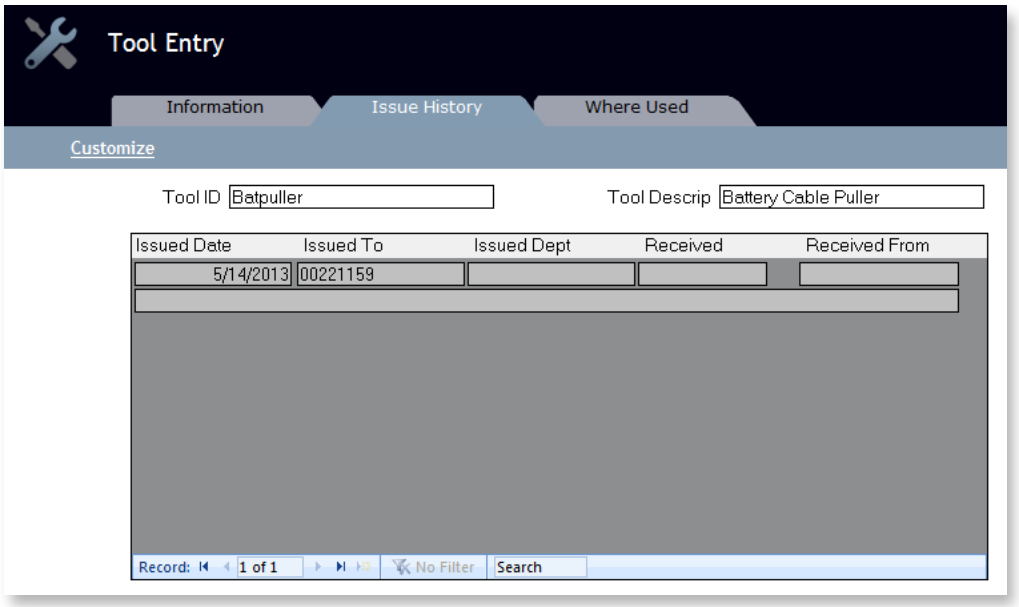
Storage Location: Where the tool is stored.

Current Location: When you first enter the tool, enter its current location in this field. FaciliWorks automatically updates this field whenever that tool is issued.

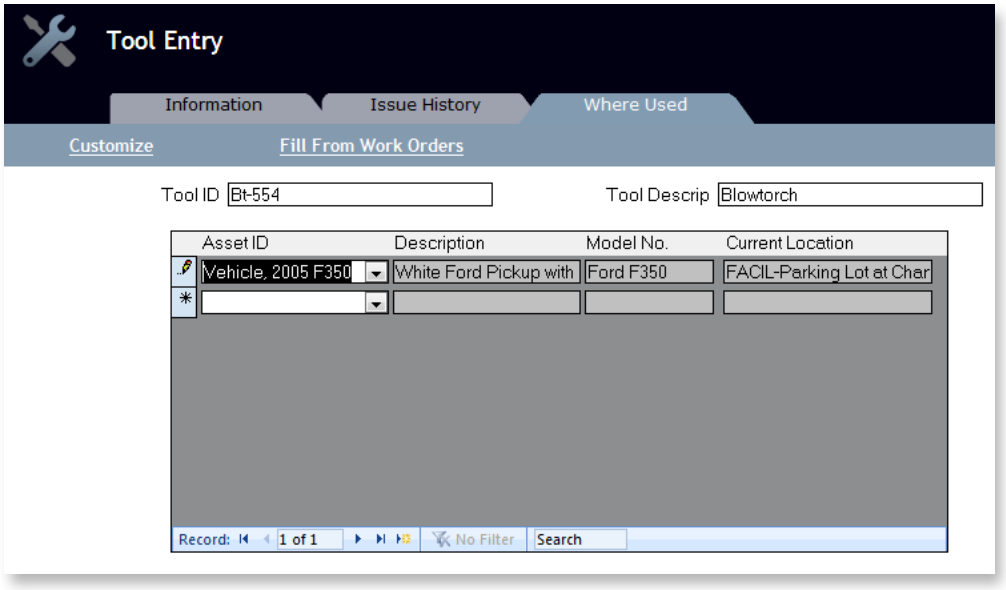
Issued: This box is automatically checked when the tool is issued.

Tool Entry – Issue History and Where Used Tabs

The **Issue History** tab information is auto-filled as tools are issued to employees for use during the performance of tasks. Every occasion on which a tool is checked out and returned is included here. The most recent information is listed at the top. You cannot edit this information here; the source of the information is in **Tools -> Edit Tool Issue and Return Records**.



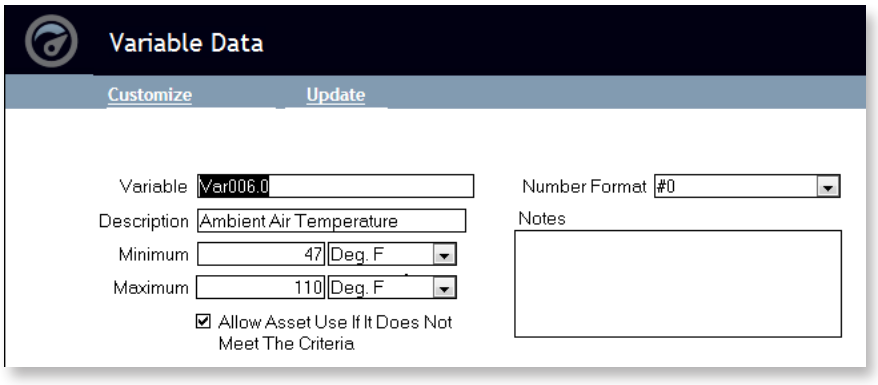
In the **Where Used** tab, you can list each asset that uses this tool.



Select as many assets as needed using the drop-down list in the **Asset ID** field – the additional information will automatically display in the remaining fields. Click the **Fill From Work Orders** button to automatically insert the **Asset ID** numbers based on completed work orders.

Variable Data

A variable is a condition that might affect the maintenance or safe operation of the asset. As a result, you must check this condition during maintenance. Measured variables such as temperature or pressure normally have to fall with a minimum and maximum range. From the Main Menu, select **Data Administration** and then click **Variable Data**. To add a new variable record, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form.



Examples of assets and their possible variables:

Asset	Possible Variable(s)
Brake drum	Degrees of flatness
Motors	Oil temperature and oil pressure
Gears	Lash
Tires	Depth of tread
Electrical	Amps
Gages	Calibration tolerances
Shafts	MM out of round

To get started, focus on the fields described below. For more information, please see **Variable Data Entry** in **Chapter Five**.

Variable: Enter a unique name of the variable being tested.

Description: Enter a brief description of the variable.

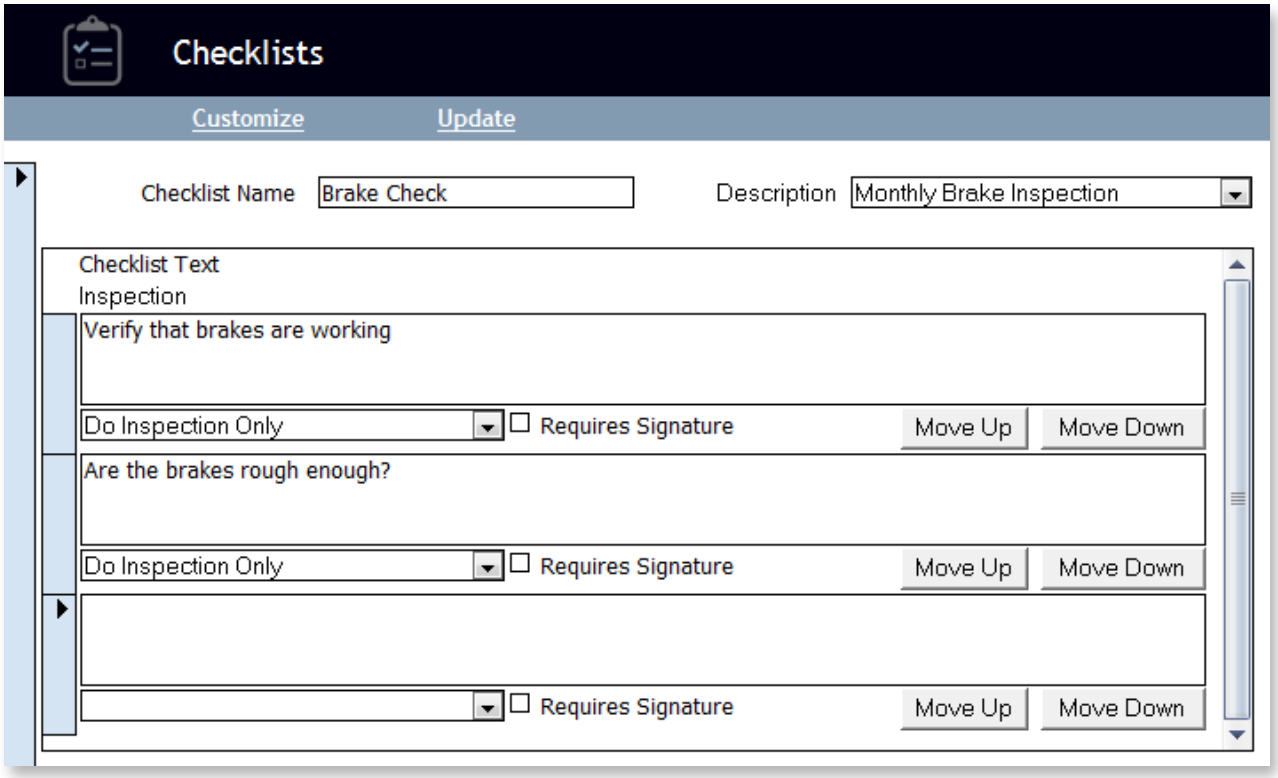
Minimum/Maximum: Enter the variable's range of limits. Use the drop-down list for measurement unit (amp, psi, etc.).

Number Format: Select the number of decimal places for accuracy.

Notes: Enter any pertinent information, such as instructions for testing the variable.

Checklists

If you need to have your technician sign off on all steps to a procedure when completing a task, use a checklist. With a checklist, each step is a separate record and each record can be signed as complete. From the Main Menu, select **Data Administration** and then click **Checklists**. To add a new checklist, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form. To get started, focus on the information provided below. For more details, please see **Checklist Entry** in **Chapter Five**.



As you add a step to the checklist, FaciliWorks provides a new blank set of fields for the next step. In the above example, this **Brake Check** procedure contains two steps. You can specify if each step requires **Do Item Only**, **Inspection Only** or both from the drop-down list. If the item requires a signature, check the **Requires Signature** box.

After typing in the steps for the checklist, you can rearrange the order of the steps by using the **Move Up** or **Move Down** buttons. Click the **Update** button to save any changes made. Updating the checklist may require that all tasks using this checklist are also updated.

Close **Checklists** to return to the Main Menu. To close, click the **File** tab on the ribbon at the top of the form and then click the **Close** button.

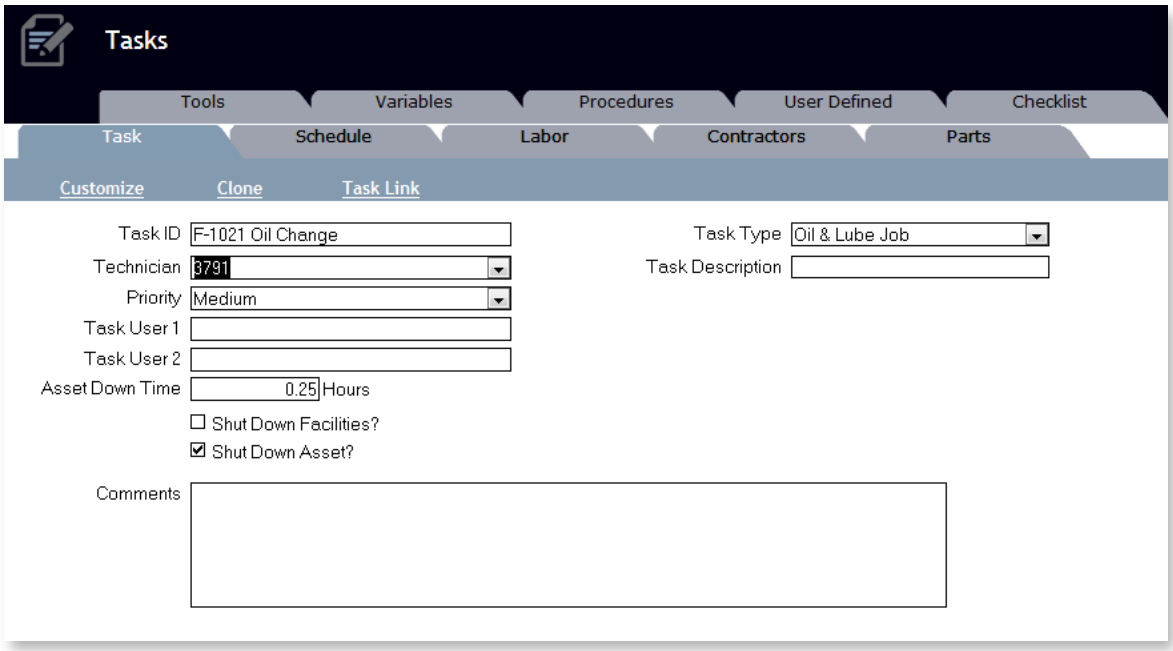
Following the Data Flow Diagram, we now have all the information we need to create a Task.

Tasks

A task defines the work performed on an asset. Any task that you enter in this form will be available for any asset when scheduling preventative maintenance or work orders. It is highly recommended that you always enter tasks here. From the Main Menu, select **Data Administration** and then click **Tasks**. To get started, focus on the fields described in this section. For more information, please see **Task Entry** in **Chapter Five**.

Tasks – Task Tab

To add a new task, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form.

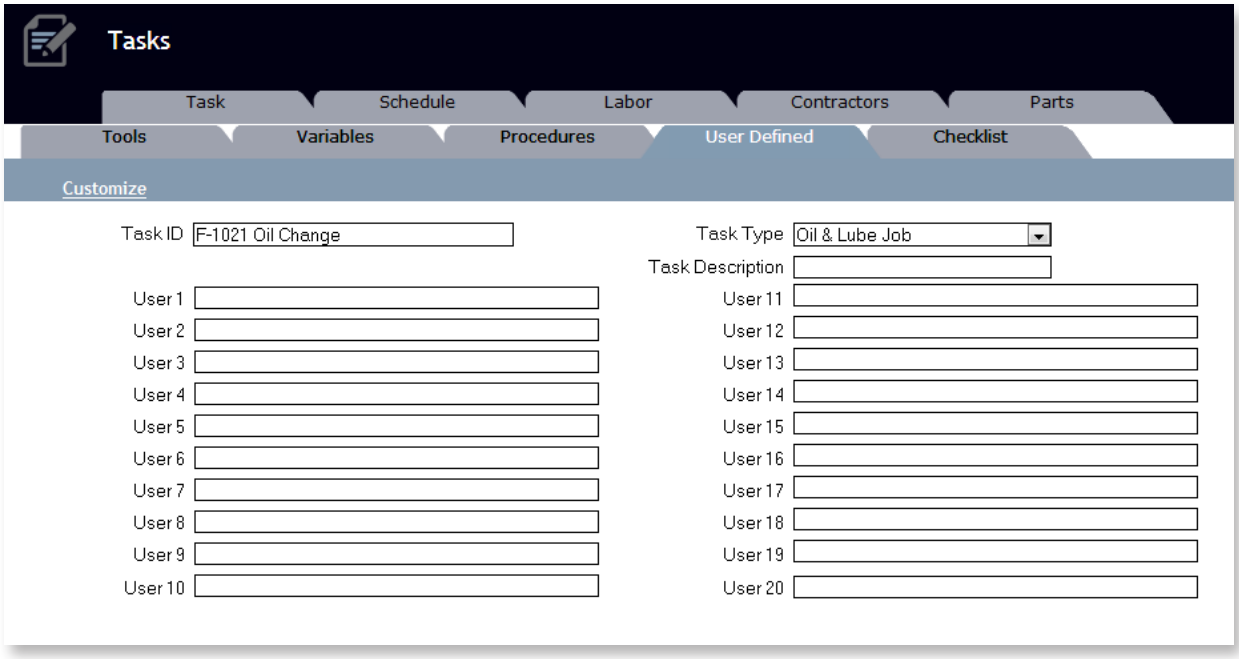


Data entered on the **Task** tab includes general information about the task. The **Technician** will be the person responsible for getting the task completed and not necessarily the person who actually performs the work. **Asset Down Time** is an estimate for most assets that will require this task for maintenance. It can be specified later. Use the checkboxes to indicate whether the facility or the asset will require a **Shut Down**. The **Comments** box can store any additional information.

The tabs across the top of the form identify the necessary task components. You will notice that each tab corresponds to data records we've already created. We now simply associate each task component to the task.

Tasks – User Defined Tab

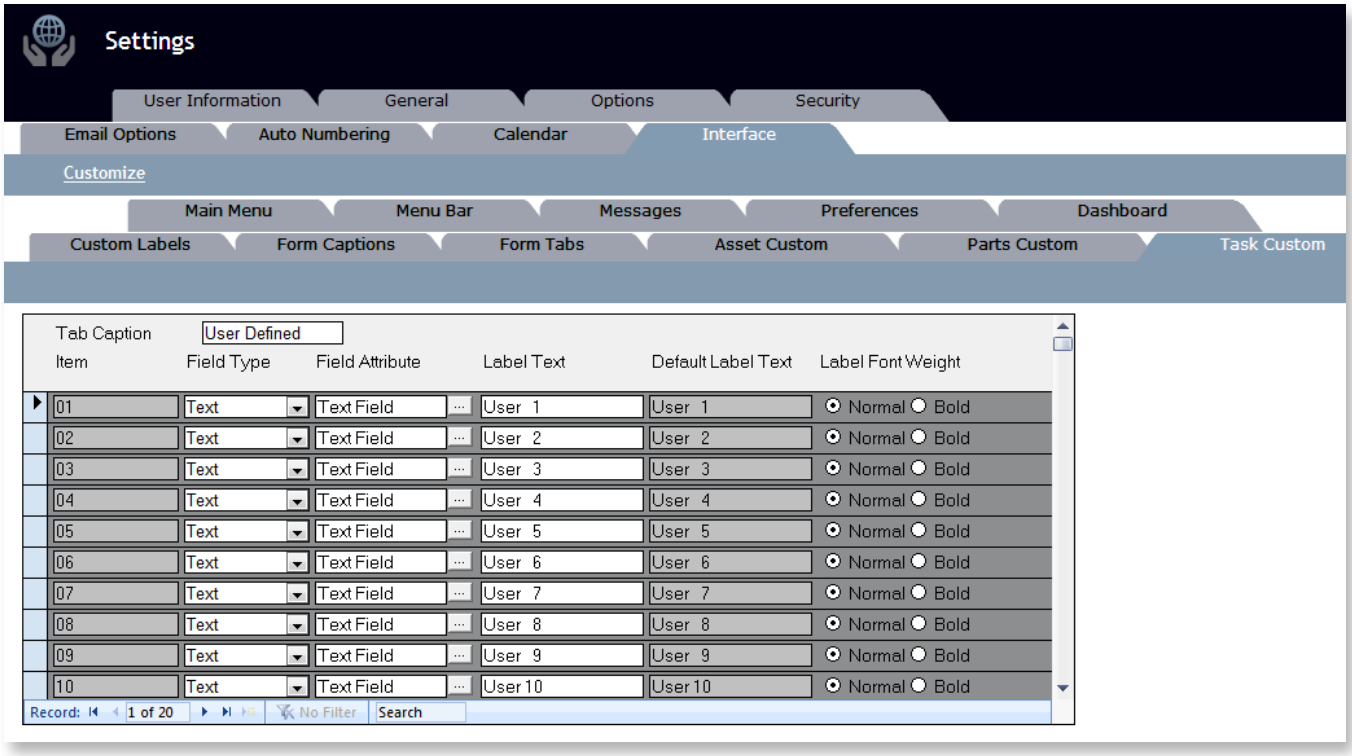
Before we begin associating the task components, there are two tabs on this form that have not been previously discussed. The **User Defined** tab contains twenty fields that can be renamed and used to store other information about a task. All fields are customizable; by selecting the appropriate option from the **Field Type** list under the **Task Custom** tab in the **Settings** menu, the field can be defined as a text field, a date field or a drop-down list.



To edit these field labels and types, close the **Tasks** window to return to the Main Menu. Navigate to the **Setup -> Settings -> Interface** tab.

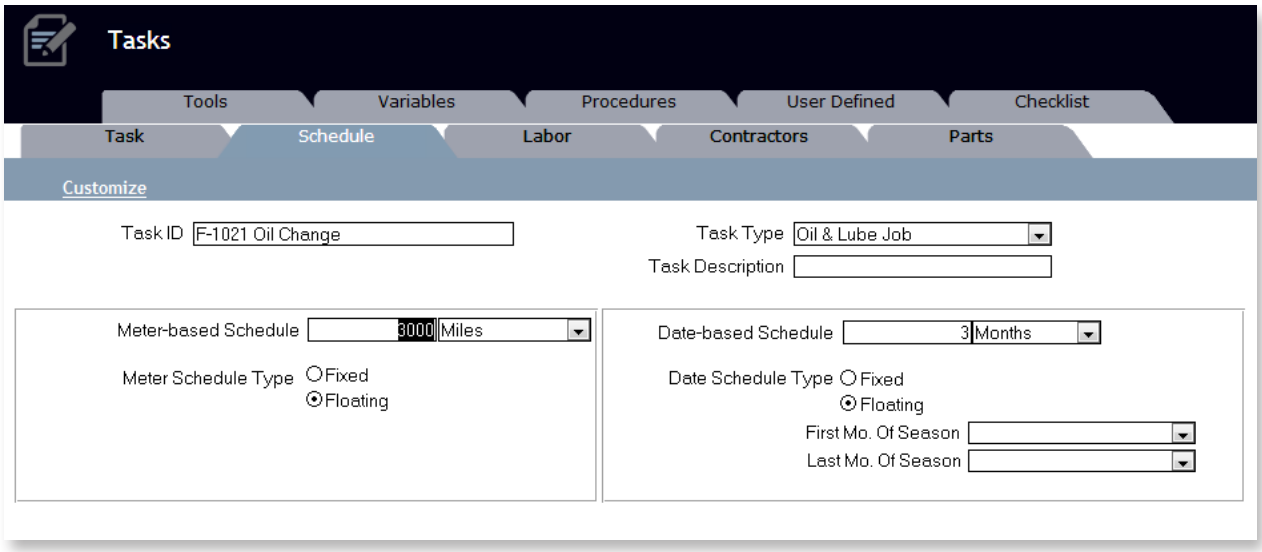
Under the **Interface** tab, click the **Task Custom** sub-tab to define the **Field Type**, **Field Attribute**, **Label Text** and **Label Font Weight**.

Close the record to save the changes. When you return to the **Tasks -> User Defined** tab, your changes will display. See **Chapter Thirteen: Program Setup** for more information.



Tasks – Schedule Tab

The **Schedule** tab allows you to initially set general information as to when this task is performed. You can set the task on a **Meter-based** or **Date-based** schedule. Regardless of the schedule used, this is only a general schedule. The schedule will be made more specific when you are performing this task on a particular asset.



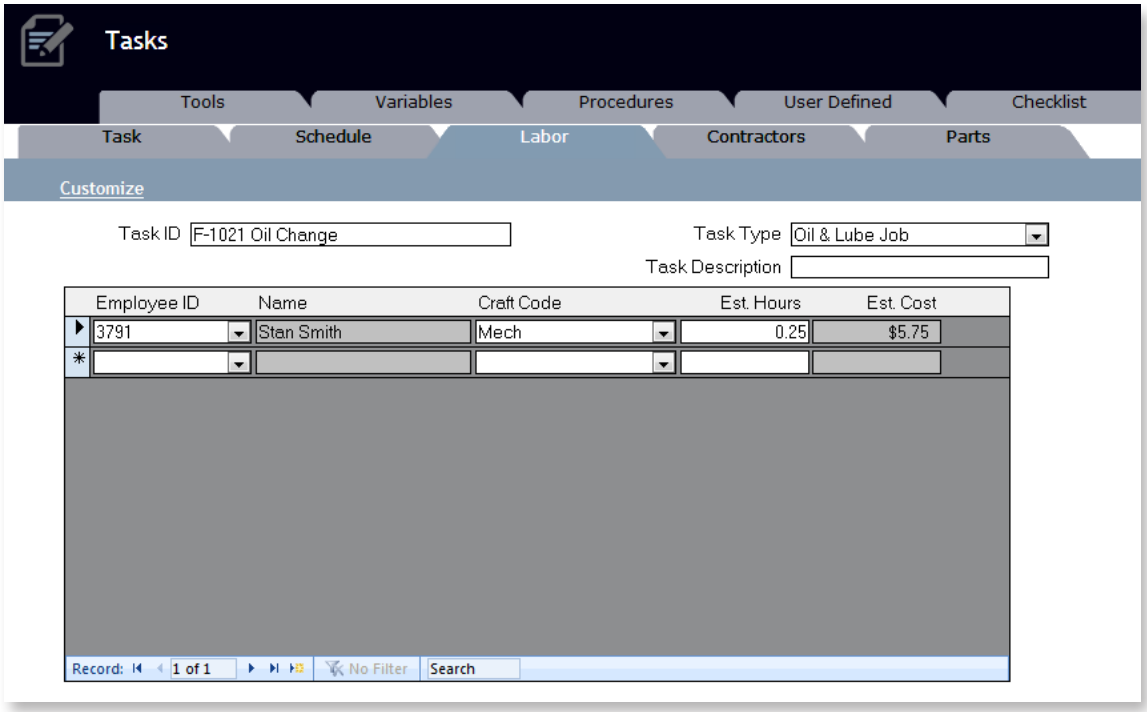
On the form above, the task is scheduled using both **Meter-based** and **Date-based Schedules**. The task is scheduled every 3000 miles or every 3 months. If both methods are used, FaciliWorks will automatically schedule the task based on the method that comes up first. Further, the date-based method allows you to schedule the task on a defined season. For example, if this oil change is to be performed on a garden tractor, the season can be defined for May through October. The task would not be automatically scheduled for any months outside of this range.

Both methods also include a schedule type of either fixed or floating. In the example in the table below, on a 1-month schedule, a task is due to be performed 3/15/13. Say that the task was not completed until 3/30/13. On a fixed schedule, FaciliWorks will calculate the **Next Date Due** as one month from the original schedule date. The floating schedule will show one month from last date performed and allows more flexibility. If you are following OSHA or FDA regulations, be sure to use the fixed schedule method.

1 month schedule	Fixed	Floating (default – reduces overuse of the asset)
Last Done	2/15/13	
Was Due	3/15/13	
Actually Done	3/30/13	
Next Due	4/15/13	4/30/13

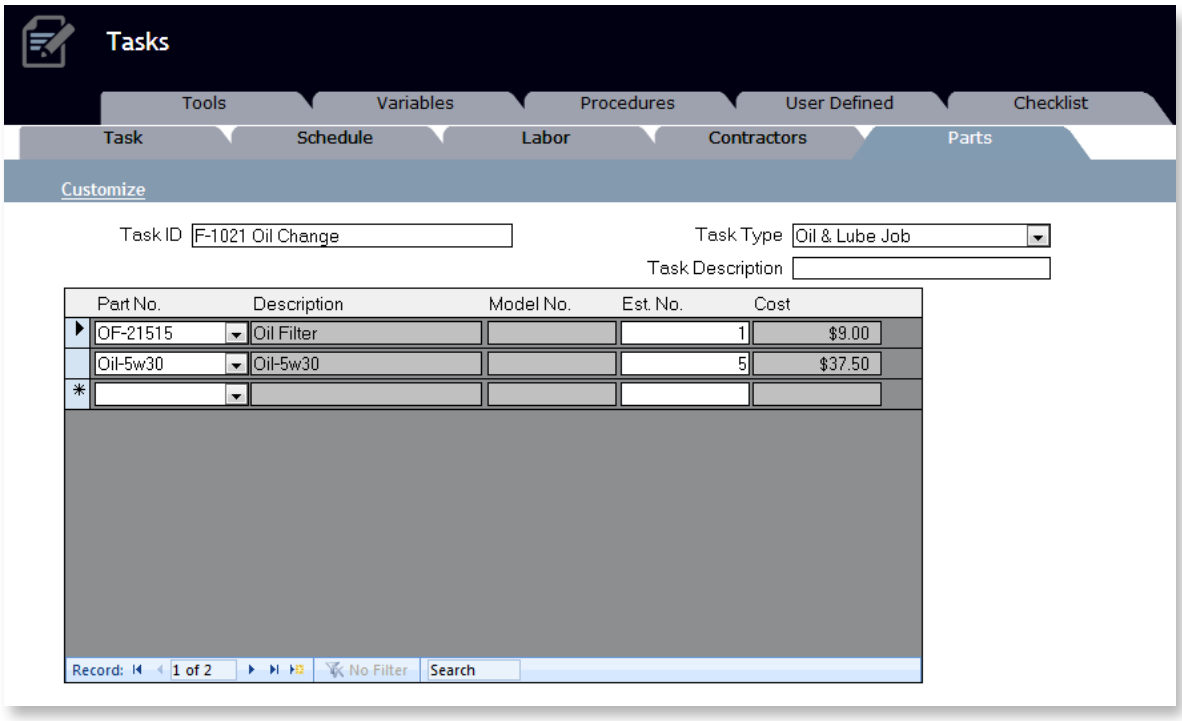
Tasks – Labor Tab

On the **Labor** tab, specify the employee who will actually perform the task. Use the drop-down list in the **Employee ID** field to select an available employee. Type in the estimated hours (**Est. Hours**) required to perform the task. The estimated cost (**Est. Cost**) field will auto-fill with the product of the estimated hours and the employee's rate specified on the **Staff Entry -> Information** tab.

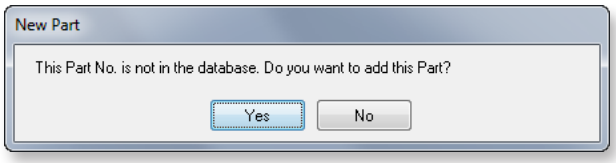


Tasks – Parts Tab

On the **Parts** tab, specify which parts will be needed to complete the task. Use the drop-down list to select parts that were entered into inventory via **Part Entry**.

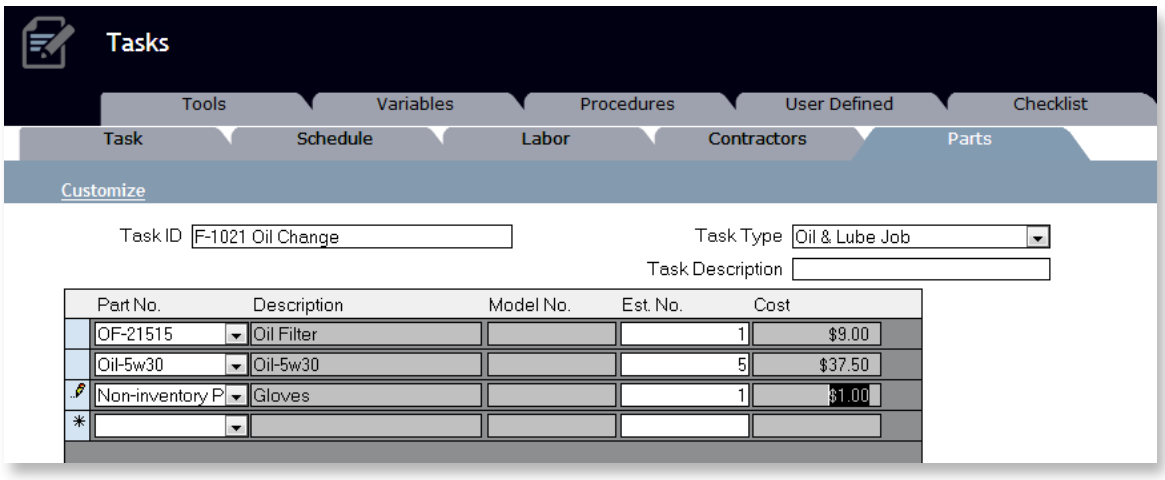


You can also type in part numbers that are not in your database. Enter the new part's **Part No.** and the following window will open:



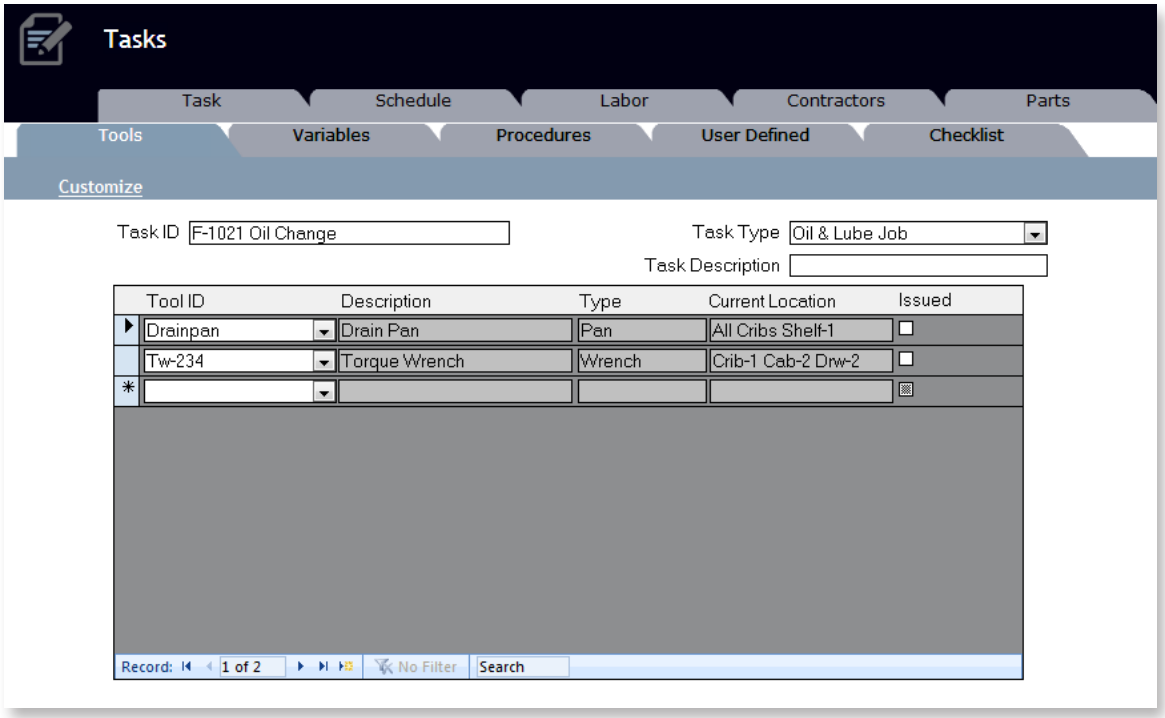
To add the part, click **Yes**. The **Part Entry** form will open in a separate window; enter the new part's information, save the changes and close the **Part Entry** form.

Back in the **Tasks -> Parts** tab (which is still open), the new part and its associated information populate the row of fields. Enter the **Est. No.** of parts and the **Cost** field will auto-fill:



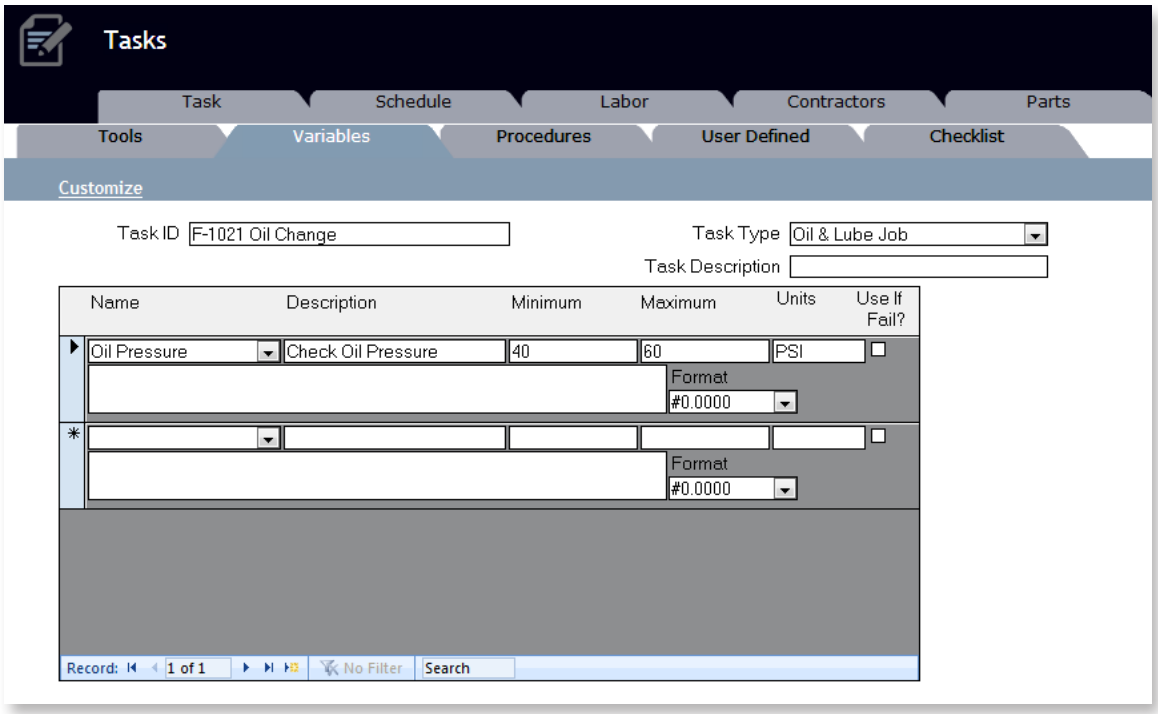
Tasks – Tools Tab

On the **Tools** tab, specify which tools will be needed to complete the task. Use the **Tool ID** drop-down list to select a tool that was entered via **Tool Entry**. **Description**, **Type** and **Current Location** will auto-fill from **Tool Entry**. If the tool was issued out to the technician performing the task, the **Issued** checkbox will be checked.



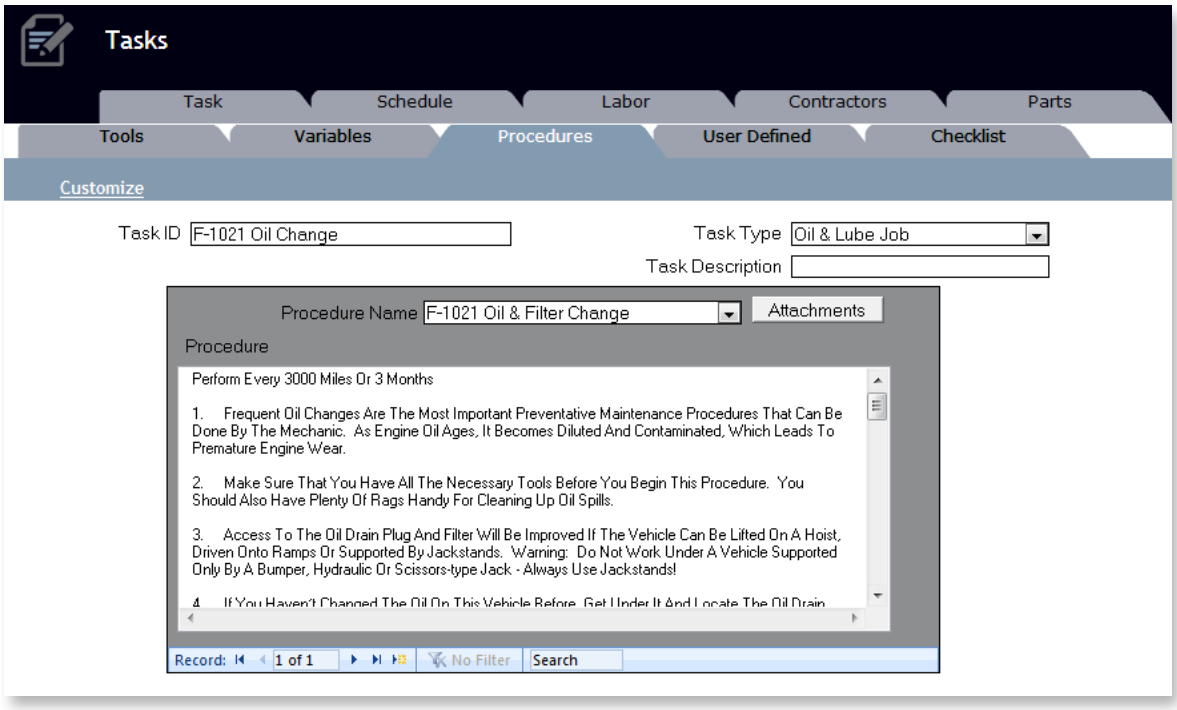
Tasks – Variables Tab

On the **Variables** tab, specify the variables that will be used to measure the tolerance range of the asset. Use the **Name** drop-down list to select a variable that was entered via **Data Administration -> Variable Data**. All other fields will auto-fill. Check the **Use if Fail** checkbox to allow the use of the asset even if it fails the set conditions.

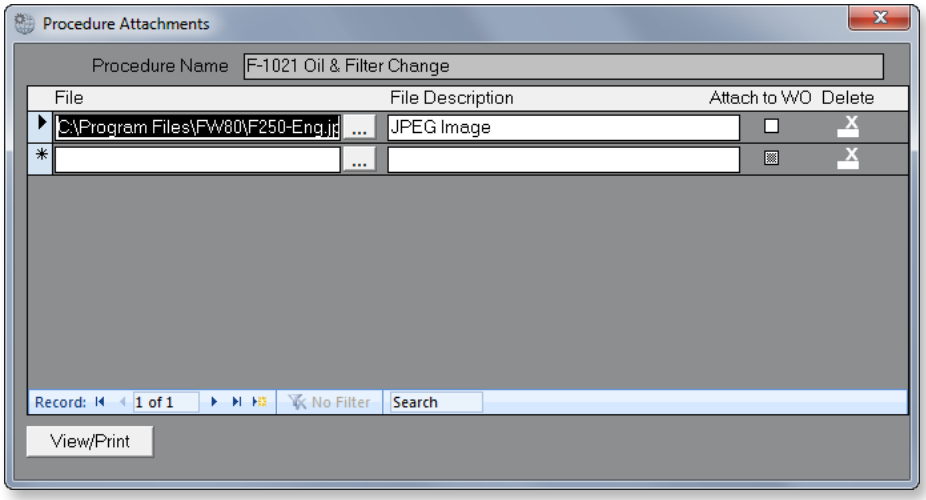


Tasks – Procedures Tab

On the **Procedures** tab, specify which procedures must be followed during the completion of the task. Use the **Procedure Name** drop-down list to select a procedure that was entered via **Data Administration -> Procedures. Procedure** text and **Attachments** will auto-fill.

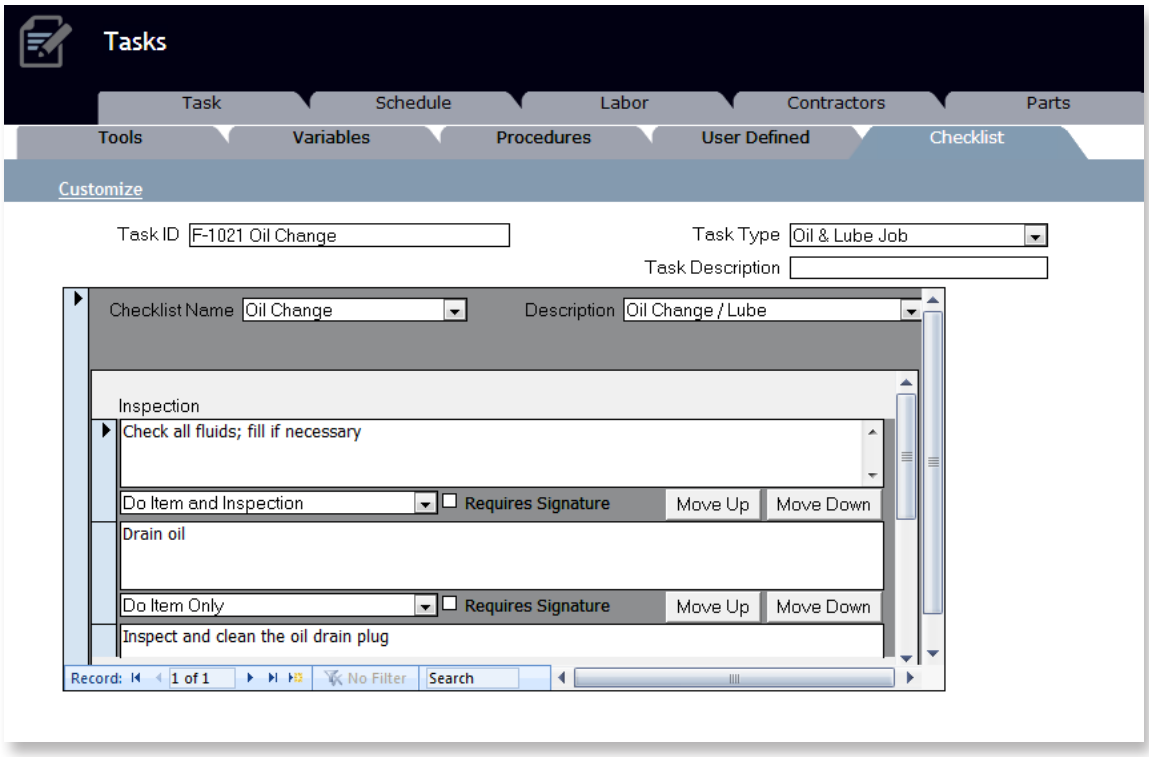

Tasks
Task
Schedule
Labor
Contractors
Parts
Tools
Variables
Procedures
User Defined
Checklist
Customize
Task ID
F-1021 Oil Change
Task Type
Oil & Lube Job
Task Description
Procedure Name
F-1021 Oil & Filter Change
Attachments
Procedure
Perform Every 3000 Miles Or 3 Months
1. Frequent Oil Changes Are The Most Important Preventative Maintenance Procedures That Can Be Done By The Mechanic. As Engine Oil Ages, It Becomes Diluted And Contaminated, Which Leads To Premature Engine Wear.
2. Make Sure That You Have All The Necessary Tools Before You Begin This Procedure. You Should Also Have Plenty Of Rags Handy For Cleaning Up Oil Spills.
3. Access To The Oil Drain Plug And Filter Will Be Improved If The Vehicle Can Be Lifted On A Hoist, Driven Onto Ramps Or Supported By Jackstands. Warning: Do Not Work Under A Vehicle Supported Only By A Bumper, Hydraulic Or Scissors-type Jack - Always Use Jackstands!
Record: 1 of 1
No Filter
Search

Click the **Attachments** button and FaciliWorks displays the path and file type of each attachment. If you have changed the location of a document, you can re-link to it here. If you want the attachments to print on the work order, check the **Attach to WO** checkbox. To view the attachment, click the **View/Print** button. The selection made here in the **Attach to WO** checkbox does not affect the original procedure record; it is specific only to this task.



Tasks – Checklist Tab

On the **Checklist** tab, specify the checklist(s) that must be used during the completion of the task. Use the **Checklist Name** drop-down list to select a checklist that was entered via **Data Administration -> Checklists**. All remaining fields will auto-fill. A checklist is used when you need to ensure that each step of a procedure was completed and can include a signature.



It is important to note here that a task will not require an entry for each tab if that particular kind of information is not being tracked. Use the tab information that you need and add tab information as you become more familiar with the software.

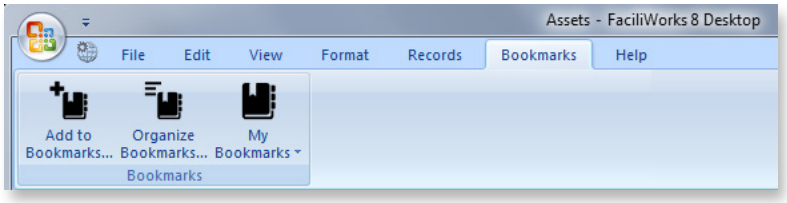
Close **Tasks** to return to the Main Menu. To close, click the **File** tab on the ribbon at the top of the form and then click the **Close** button.

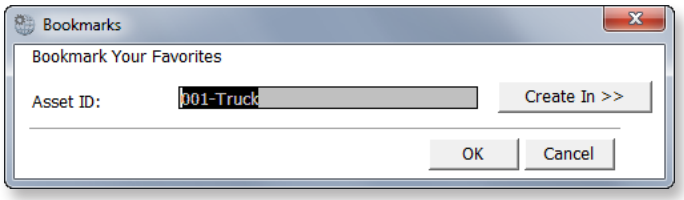
Now that all task information has been entered, you can associate the task to assets.

Assets

Navigate to **Data Administration -> Assets** to input and store all information regarding your assets including maintenance scheduling and tracking. Assets are everything in your business that you need to test, replace or service at regular intervals based on either elapsed time or actual usage, including vehicles, machinery, buildings, individual components, fixtures and facilities.

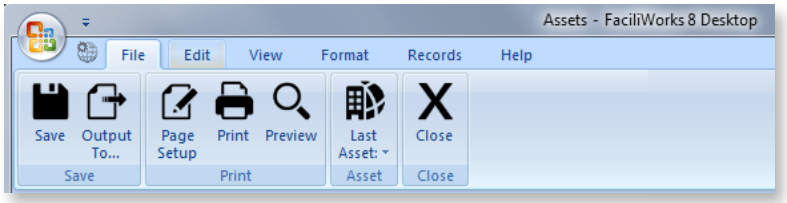
You can bookmark records that you frequently use or access, making it easy for you to find the data you need. To bookmark a record, simply access the **Bookmark** option from the ribbon and add the record to your favorites. You can also delete and organize bookmarks. See **Bookmarks Tab** in **Chapter Four** for more information.





Note: The Bookmark option is only available for Assets and Work Orders.

You can access your most recent modified asset records via the **File** tab's **Last Asset** button. This function displays the last 10 edited records; the most recently modified record is listed first.

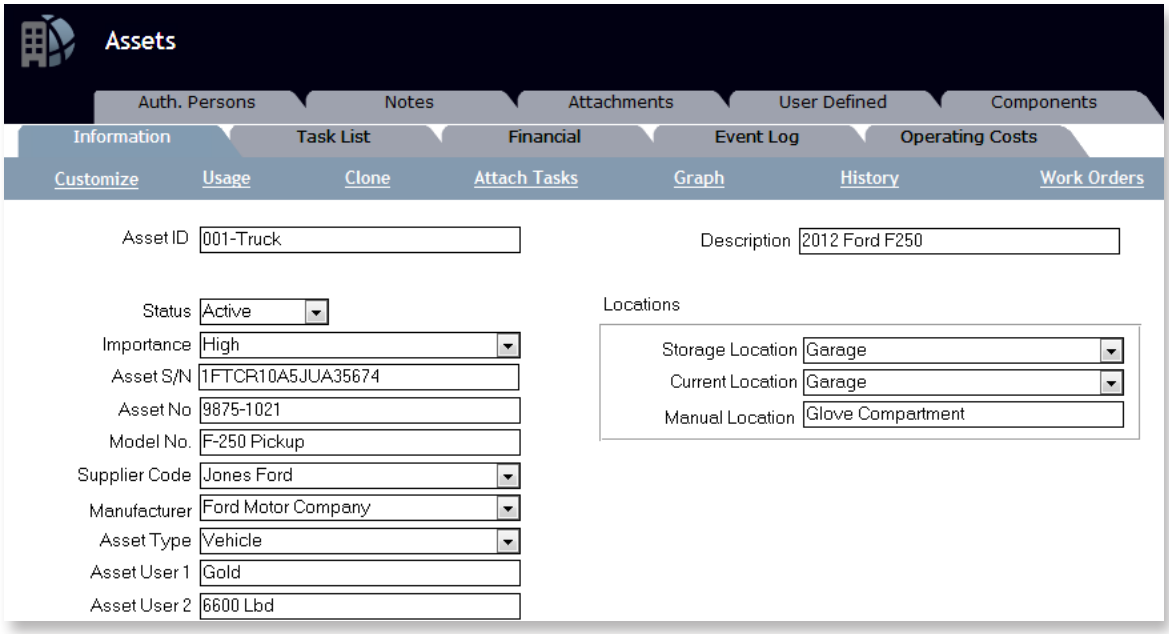


When you navigate to **Data Administration -> Assets**, the **Information** tab is displayed. To add a new asset, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form.

To get started, we will focus on the **Information** and **Task List** tabs of **Assets**. For more detailed information about asset record entry, please see **Asset Entry** in **Chapter Five**.

Assets – Information Tab

Use this tab to enter information about the asset. Use your mouse cursor or TAB key to move between fields on this form.



Asset ID: Enter a unique alphanumeric identification code for each asset record. You must create a unique ID for each asset in order to store the record in your database.

Description: Enter a brief description of the asset.

Status: Assign a status to the asset. If the **Status** field is not 1 (active), the asset will not be included on scheduled preventative maintenance.

Importance: Assign a priority rating to indicate how important the asset is to your operations.

Asset S/N: Enter the asset's serial number.

Model No.: Enter the asset's model number.

Supplier Code: Use the drop-down list to select the supplier of the asset. Supplier records become available in this list once they are entered via **Data Administration -> Suppliers**.

Manufacturer: Enter the name of the asset's manufacturer.

Asset Type: Group assets for reporting or analysis purposes based on type. FaciliWorks will create a self-building drop-down list as you enter new types.

Asset User 1 & **Asset User 2**: Enter any additional information about the asset in these fields.

Storage Location: Note the storage location of the asset. FaciliWorks will create a self-building drop-down list as you enter new storage locations.

Current Location: Enter the asset's current location. An employee name may appear here if the asset is issued.

Manual Location: Enter the location of the asset's user manual.

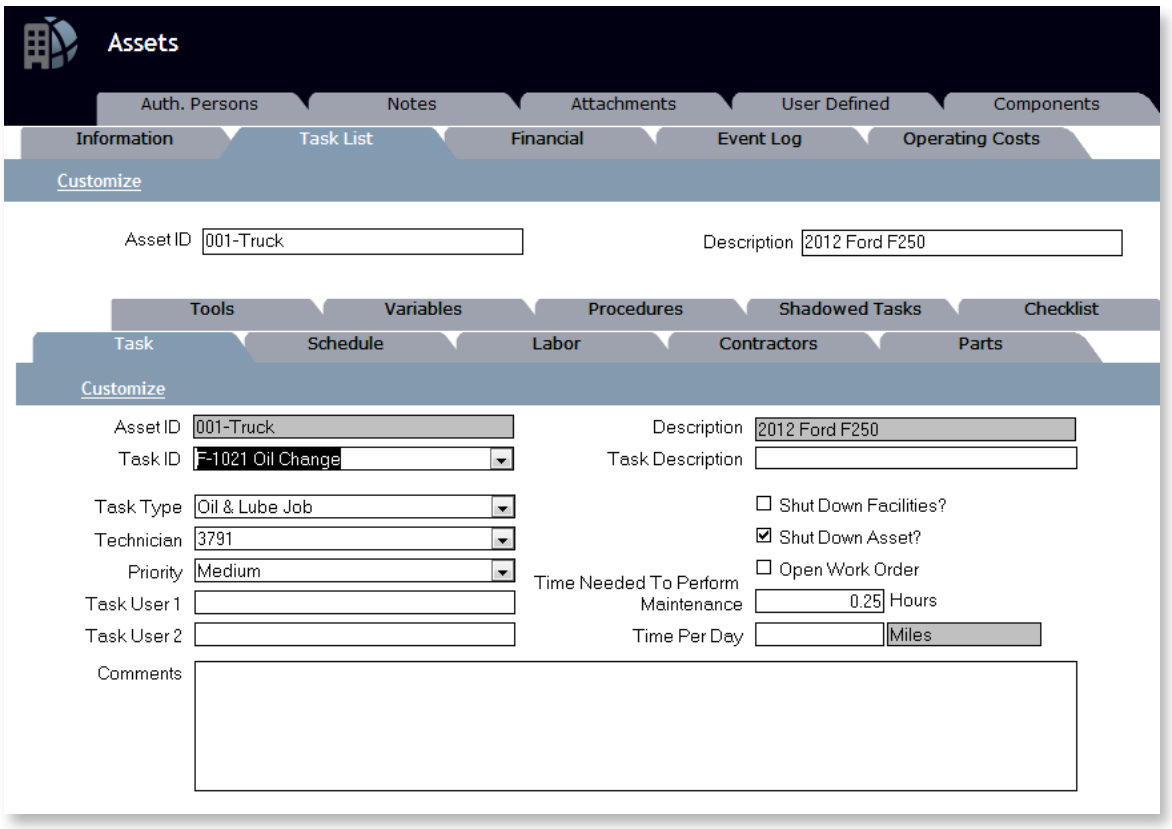
Assets – Task List Tab

Notice that the **Task List** tab contains sub-tabs that contain all of the task's components. At this point, you've already entered all task components into the database and you've attached the components to task records. All task component information will auto-fill to its corresponding component tabs when you select the task in the **Task** sub-tab. If you need to modify the task components as they relate to this specific asset, you can do so in the component sub-tabs after attaching the task to the asset.

Task List – Task Sub-tab

Use this form to attach all pertinent tasks to an asset. Notice that there are two record navigation bars in this window. The one at the bottom of the window corresponds to the asset records; the one above that corresponds to the task records.

Because we have already entered our tasks into the database, we simply need to select the task(s) for this asset.



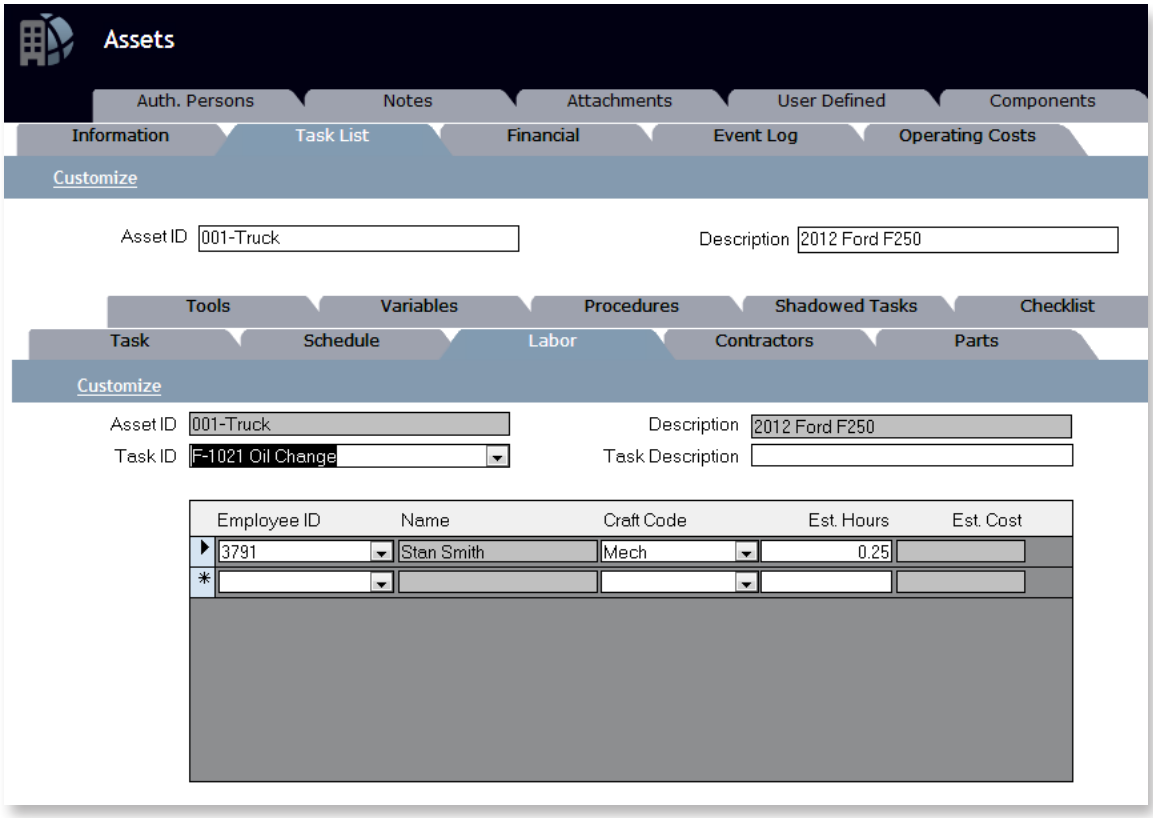
To attach a task to the asset, make a selection from the **Task ID** drop-down list. All related information will auto-fill this form as well as the component sub-tabs.

To attach a second task to the same asset, click the **New Blank Record** icon associated with the **Task** sub-tab and select another **Task ID** from the drop-down list.

Now that the task is associated with the asset, go through each sub-tab to modify component information to be specific to the asset.

Task List – Labor Sub-tab

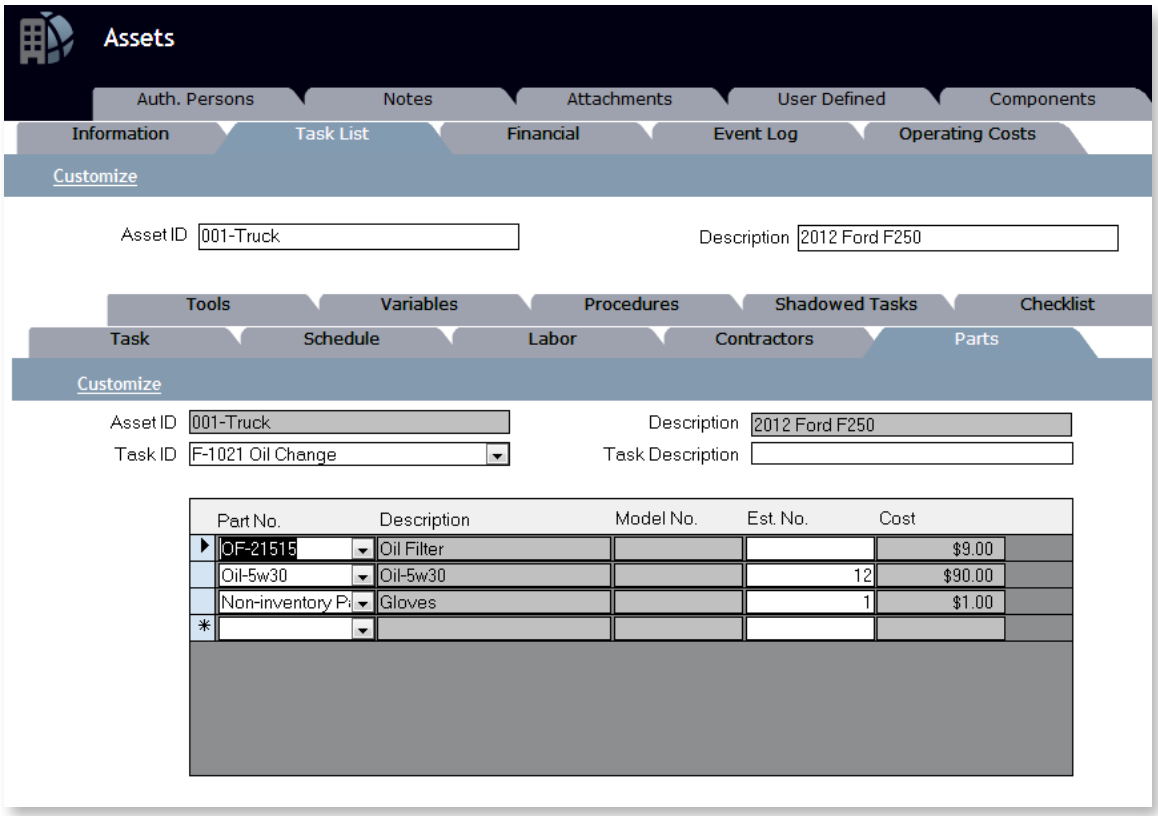
In the **Asset ->Task List -> Labor** sub-tab, you can assign additional active employees to a task or delete employees that have already been assigned. The **Craft Code** and the **Estimated Hours** can be modified here.



To delete a labor record, place the cursor in the **Employee ID** field of the record to be deleted. On the ribbon, click **Records** and then click the drop-down menu on the **Delete** button. Select **Delete Record**.

Task List – Parts Sub-tab

In the **Assets -> Task List -> Parts** sub-tab, you can add parts from the database using the drop-down list in the **Part No.** field. FaciliWorks will auto-fill **Description** and **Model No.** if the information was previously entered in **Part Entry**. These fields are grayed out as they are not editable here. When you type in **Est. No.** of hours for the task, the **Cost** field is auto-filled with the product of employee's rate (which was entered in **Staff Entry**) and the estimated number of hours.

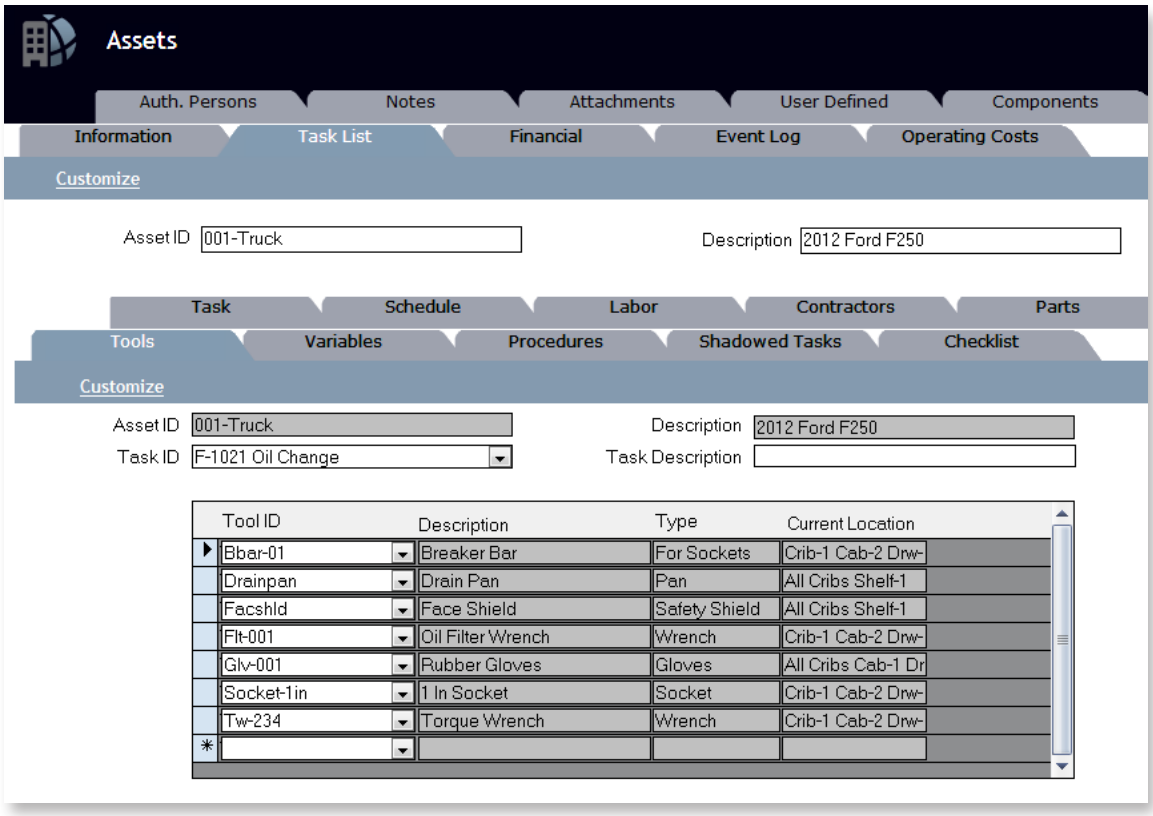


You can also add parts that are not in your database by typing a new value in the **Part No.** field. In this case, FaciliWorks will ask if you want to add the part to the database. If so, the **Part Entry** form will be displayed for you to enter all pertinent data.

Part records can be deleted from this sub-tab. To do so, click in the **Part No.** field of the part you want to delete. Click the Ribbon's **Record** tab, click the **Delete** drop-down menu and click **Delete Record**.

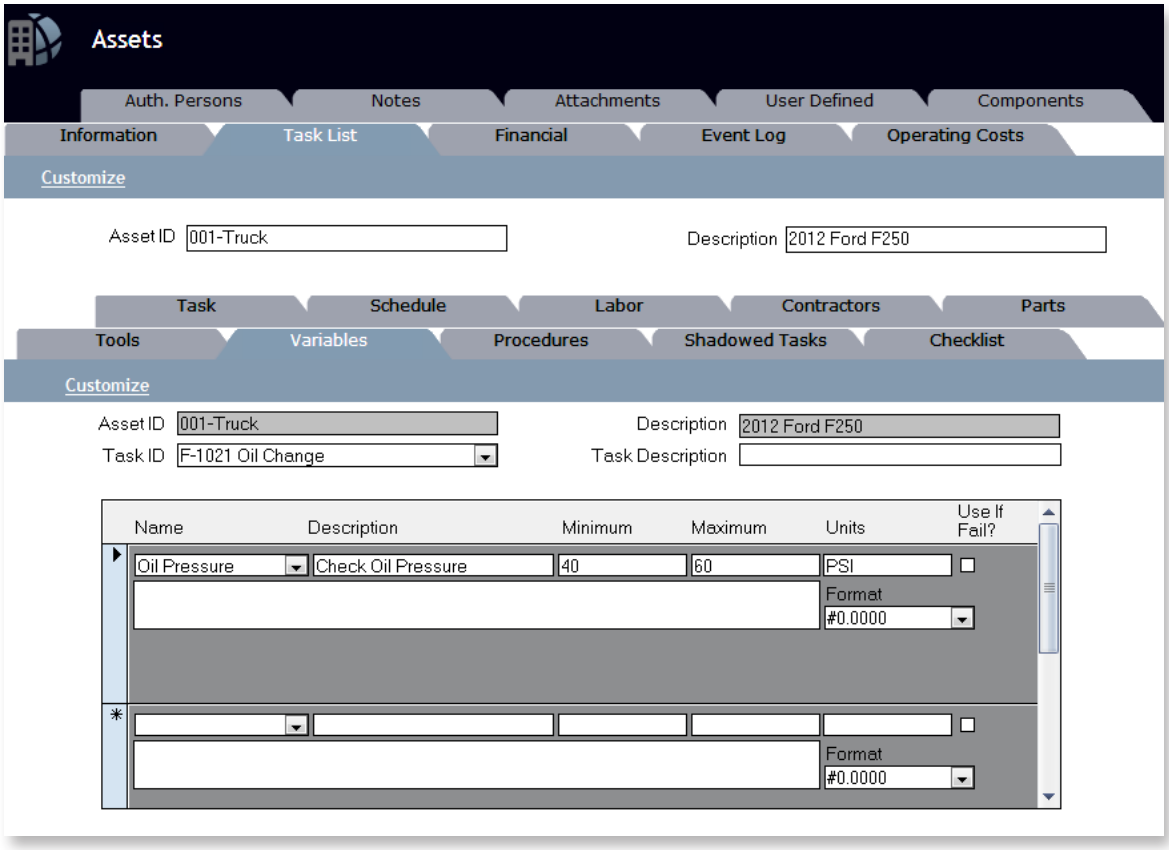
Task List – Tools Sub-tab

In the **Asset -> Task List -> Tools** sub-tab, you can add records by selecting from previously entered information by using the drop-down list in the **Tool ID** field. FaciliWorks will automatically display the **Description**, **Type** and **Current Location** of the tool if the information was previously entered in **Tool Entry**. These fields are grayed out as they are not editable here. Tools can be removed from this form.



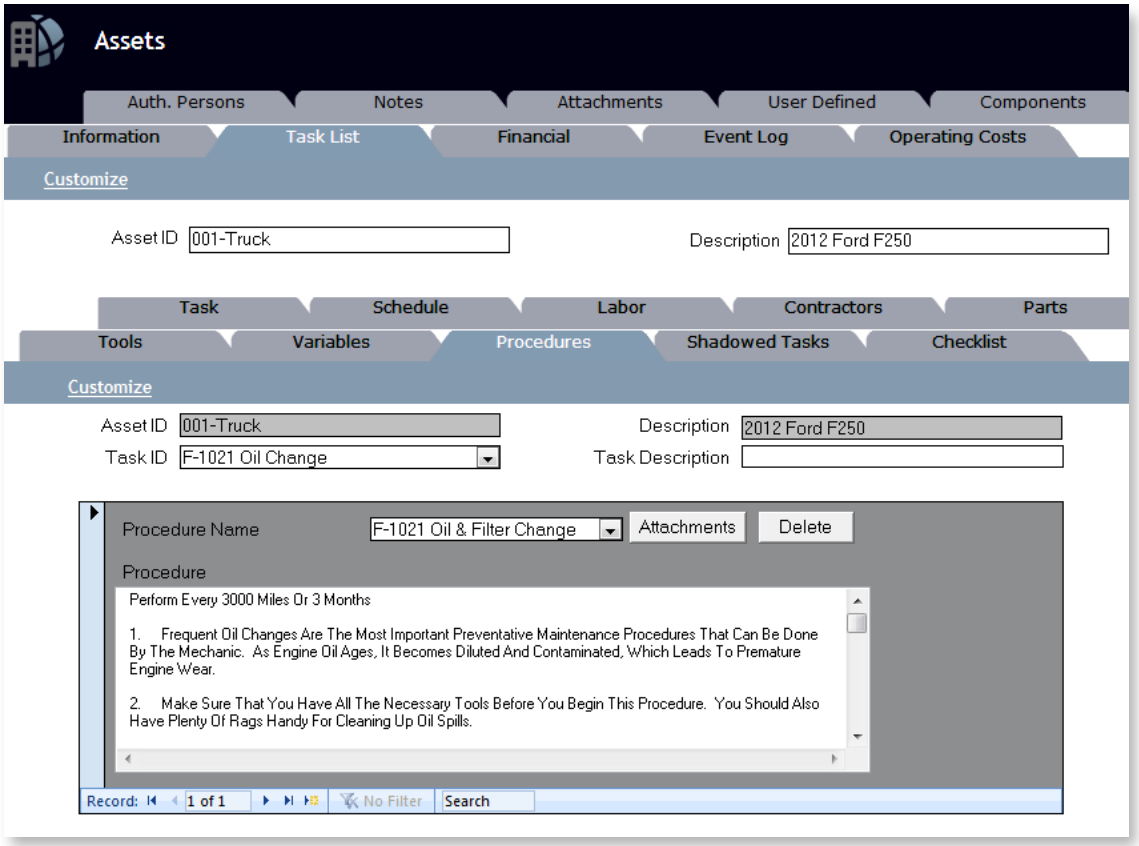
Task List – Variables Sub-tab

In the **Asset -> Task List -> Variables** sub-tab, you can edit previously defined variable information to be unique to this asset (except the variable name). You can also add records here by using the drop-down list in the **Name** field to select a variable from the database. Variables can also be deleted from this form.



Task List – Procedures Sub-tab

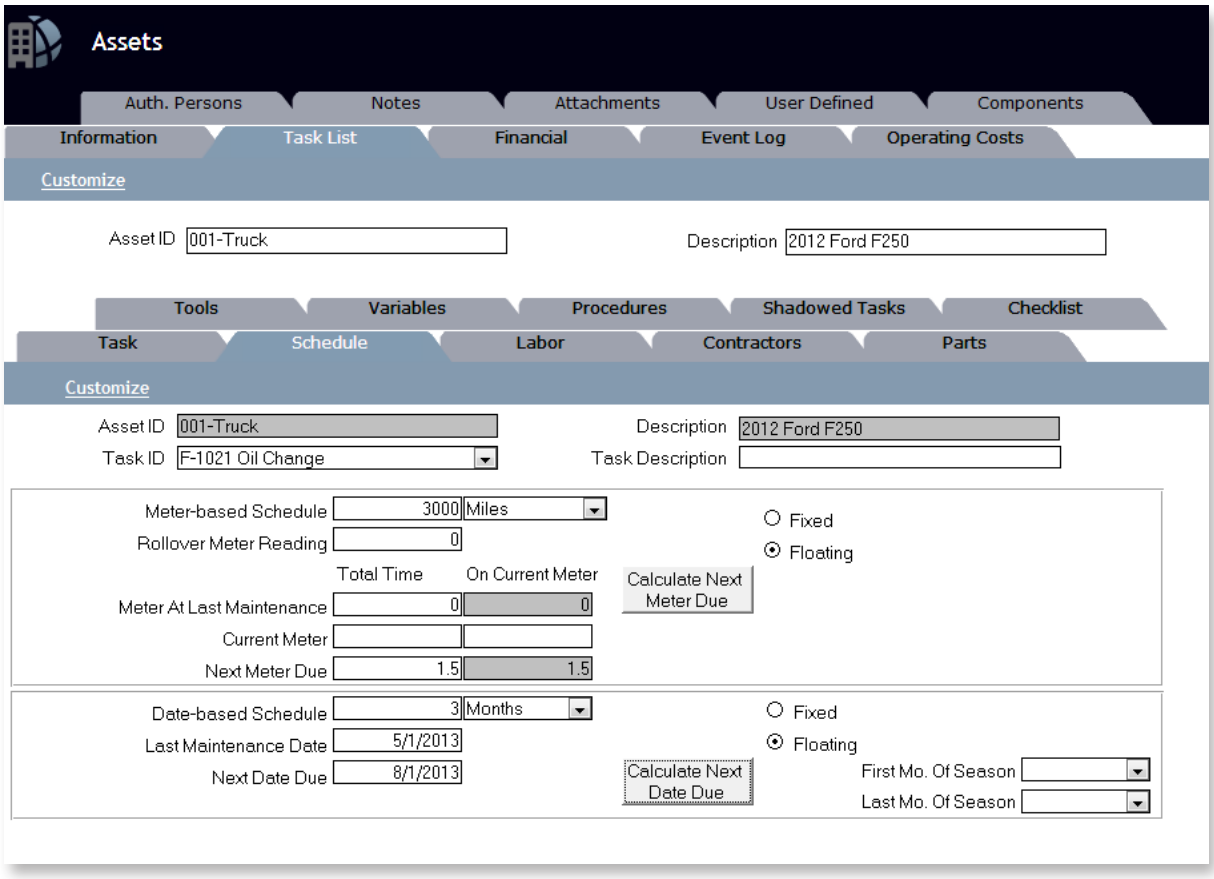
In the **Asset -> Task List -> Procedures** sub-tab, you can add procedures by selecting one or more previously entered procedures that apply to this task. Use the navigation arrows at the bottom of the **Procedures** sub-tab to view any additional procedures that are linked to the record. Procedure records can be deleted from this form using the **Delete** button. Deleting a procedure from the form will not delete it from the database. If you have other task components attached to your task, select the corresponding tabs to modify any information as appropriate.



Task List – Schedule Sub-tab

On this form, enter information about how often this task will be performed on this asset. For example, the sample form shows that the oil change should be performed every three months or 3000 miles.

Upon completing this form, the **Next Meter Due** and/or the **Next Date Due** will automatically be calculated when the **Calculate Next Meter Due** and/or **Calculate Next Date Due** buttons are clicked. When these values are calculated, FaciliWorks will send a notification that a work order is to be created for this work. This action starts the continuous process for scheduled work orders. After the work order is scheduled and completed, the program will automatically send notification for the next work order to be created and the ongoing schedule is set. This schedule continues until the asset status is no longer active. We will look at the work order notification in the next chapter.



Meter-based Schedules

Meter-Based Schedule: If the schedule for this maintenance is based on asset usage or meter readings, enter the number of units on the left and then select the type of units from the drop-down list on the right. Available units include minutes, hours, days, cycles, miles and kilometers.

Rollover Meter Reading: Enter the meter value when you replaced the meter or when it rolls back to zero.

Total Time and **On Current Meter** columns: Enter the total meter value for **Meter at Last Maintenance**, **Current Meter** and **Next Meter Due** in the **Total Time** column. FaciliWorks will enter values in the **On Current Meter** column based on the value entered in **Rollover Meter Reading**.

Meter at Last Maintenance: In this field, enter the meter value for the asset at the time when you last performed this task. FaciliWorks will fill in the updated value for this field when a work order for the task is completed.

Current Meter: Enter the current meter value for the asset. If you complete any work order for this asset that has a higher meter reading, then the current meter reading will be updated.

Next Meter Due: Click the **Calculate Next Meter Due** button on the right of these entries and FaciliWorks will automatically calculate the meter value at which this task should be performed next. You can override the calculated **Next Meter Due** value by typing information into this field. This field will be recalculated when you complete the work order for this asset task.

Date-based Schedules

Date-Based Schedule: If you perform the task according to a calendar schedule, enter the interval number on the left and select the unit of time on the right. The available units are days, weeks, months, years, EOM (End of Month) and DOM (Date of Month). EOM is similar to months, but it advances the **Next Date Due** to the last valid day of the month. DOM is similar to months, but it advances the next date due to the same date each month. See **Skip Dates** for more information about skipping days of the week, such as Saturday and Sunday, or specific dates, such as national Holidays.

Last Maintenance Date: When you're setting up this task, enter the last date on which this task was performed for this asset. After the task has been completed, FaciliWorks will automatically update this field with the most recent completion date.

Next Date Due: Click the **Calculate Next Date Due** button to the right of this field for FaciliWorks to automatically calculate the next date this task should be performed. Override the automatic calculation by typing the information into this field.

First Mo. of Season and **Last Mo. of Season**: If the task is seasonal, i.e., it is not performed year-round, such as mowing a lawn or spreading sand on sidewalks, select the name of the first month the task is performed and the last month the task is performed from the appropriate drop-down list. The calculated **Next Date Due** for that work order will fall between the starting month and the ending month, inclusive.

Adding Additional Tasks to the Asset

An asset may have more than one task associated with it. For example, after attaching a brake inspection task to a truck asset, you can add an oil change task to the asset.

To attach another task to the asset, navigate back to the **Assets -> Task List -> Task** sub-tab and click the **New Blank Record** button. Use the **Task ID** drop-down menu to select a task; all components of the task will auto-fill from the task entry form.

Modify information in each task component tab as necessary. When you complete the **Schedule** sub-tab, the process will be set for scheduled work orders.

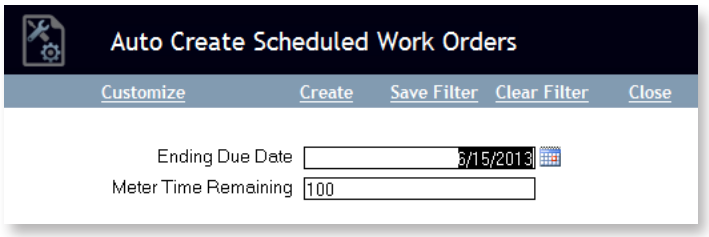
Scheduled Work Orders

Once you have developed an asset-task record and set a schedule for it, FaciliWorks will generate a notification that a work order can be created. Work orders are not automatically generated; you retain control of them. There are several ways to create scheduled work orders. To get started, we will introduce the **Auto Create Scheduled Work Orders** and **Manual Create Scheduled Work Orders** functions. For more information about work orders, please see **Chapter Six: Work Orders**.

Auto Create Scheduled Work Orders

The **Auto Create Scheduled Work Orders** function will create all work orders for assets that have been scheduled. When the work orders have been created, FaciliWorks will preview the work orders for you. They can then be printed or electronically distributed to the technicians who will be completing the work.

From the Main Menu, navigate to **Work Orders -> Auto Create Scheduled Work Orders**. A filter is displayed that lets you to create work orders for all maintenance tasks due by a certain date (FaciliWorks automatically fills in a date one month from the current date). To change the default date, type the date in the **Ending Due Date** field.



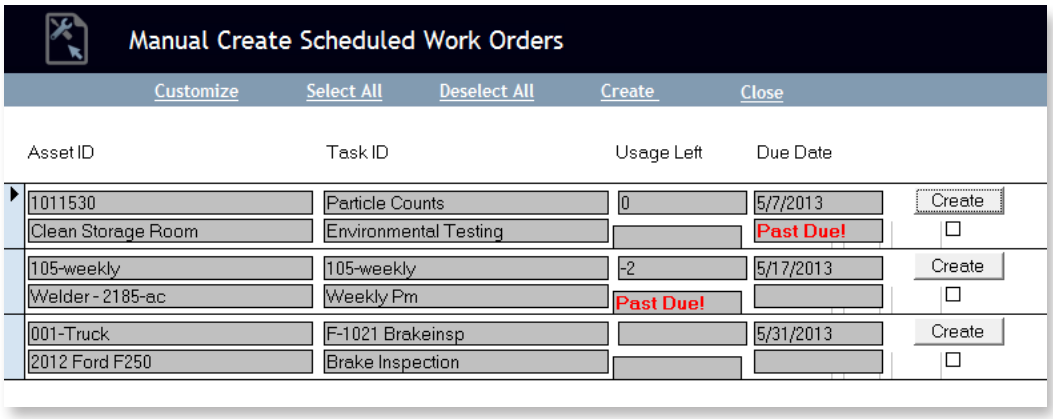
Work orders can also be created for tasks due based on a meter reading (defaults to 100). To change the default reading, type the amount of **Meter Time Remaining**.

If you want to save the value(s) you've entered to be the new default values, click **Save Filter**. Click **Clear Filter** to remove the filter values and **Close** to return to the Main Menu.

To create all work orders that satisfy the filter criteria you've entered, click the **Create** button. FaciliWorks creates the work orders and then asks if you want to print them immediately or view them first. The printed work order contains all of the asset and task information. It will also include all components that you previously defined for the tasks needed for each work order.

Manual Create Scheduled Work Orders

The **Manual Create Scheduled Work Orders** function allows you to selectively create work orders. From the Main Menu, navigate to **Work Orders -> Manual Create Scheduled Work Orders**. The following form appears:



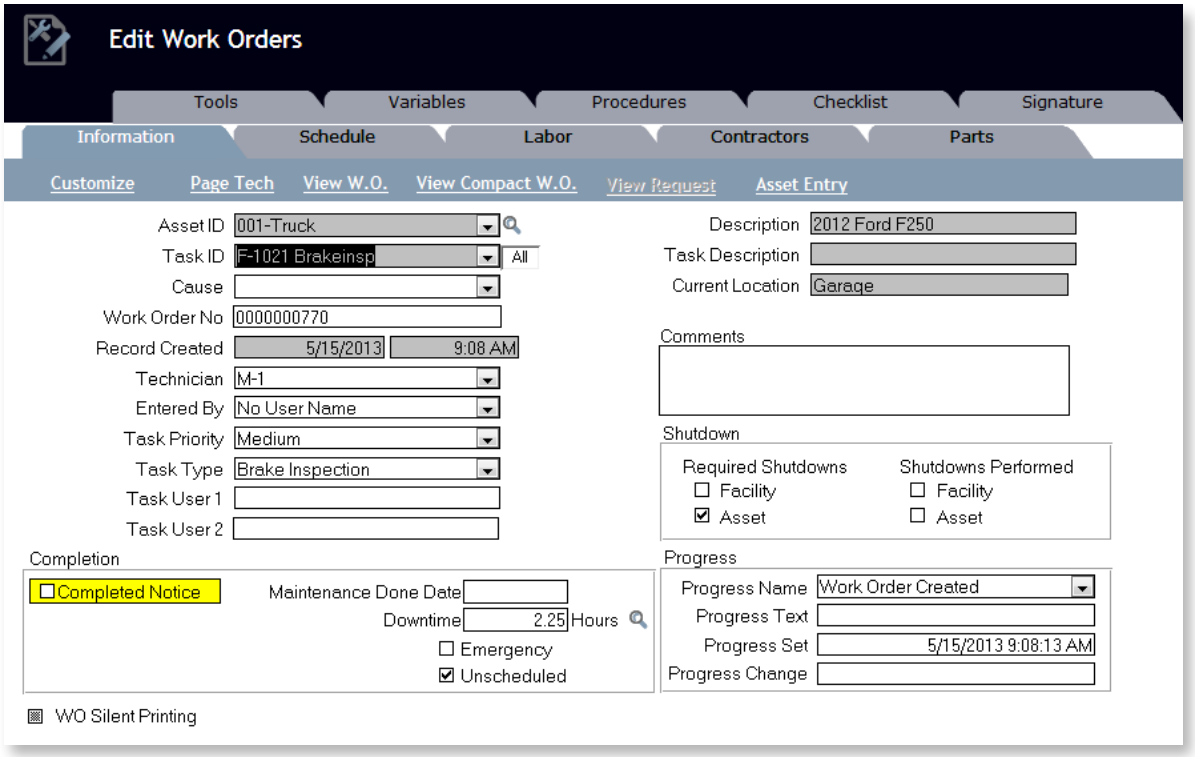
The assets that are due for maintenance are displayed along with the due date and current meter usage remaining (if a meter-based schedule was defined for the task). To create a single particular work order, click the **Create** button associated with the record. To create multiple work orders, check the boxes below the **Create** buttons and then click the **Create** button in the green strip just below the form title. To select all work orders, click the **Select All** button and then click **Create**.

Important: The meter rollover feature does not affect **Auto Create Scheduled Work Orders** or **Manual Create Scheduled Work Orders** because these utilities operate on the difference between **Current Meter** and **Next Meter Due**. This value will be the same for both the left and right columns of these two fields. For example, if an asset's total **Current Meter** (left field) was 2260 when the total **Next Meter Due** value (left field) was 2300, the difference is 40 hours. When the actual **Current Meter** value (right field) was 10, the current **Next Meter Due** (right field) was 50. The difference between these two fields is also 40. Since this difference will always be the same value, the meter rollover feature does not affect either of these functions. For more information on the meter rollover feature, see the **Meter-based Schedule** section.

Edit Work Orders

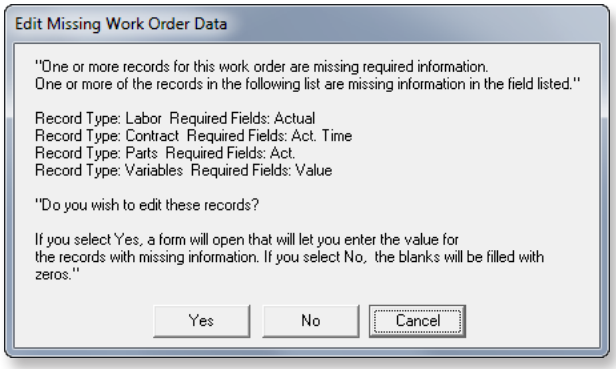
Once the work orders have been created, you can edit them by adding or modifying information or by completing the work order. Navigate to **Works Orders -> Edit Work Orders**.

Although all complete and incomplete work orders can be viewed here, FaciliWorks will, by default, display only incomplete work orders. This is indicated by the **Filtered** button at the bottom of the form. To show all work orders, click the **Filtered** button (this action removes the filter).



Each tab here displays the same information as the task component tabs. Simply click each tab to edit or complete the information. After the work order has been edited, it can be printed and given to the technician who will perform the work. Click the **View WO** button and then click **Print**.

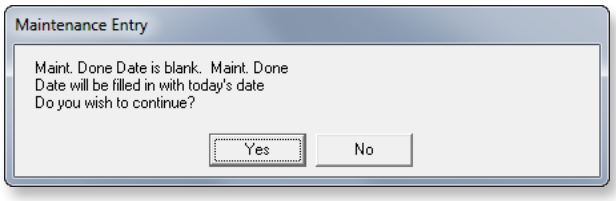
When you are ready to complete the work order, click the **Completed Notice** checkbox. If there is any information missing from any of the task component tabs, FaciliWorks will display a message similar to the following:


Edit Missing Work Order Data
"One or more records for this work order are missing required information.
One or more of the records in the following list are missing information in the field listed."
Record Type: Labor Required Fields: Actual
Record Type: Contract Required Fields: Act. Time
Record Type: Parts Required Fields: Act.
Record Type: Variables Required Fields: Value
"Do you wish to edit these records?
If you select Yes, a form will open that will let you enter the value for
the records with missing information. If you select No, the blanks will be filled with
zeros."
Yes
No
Cancel

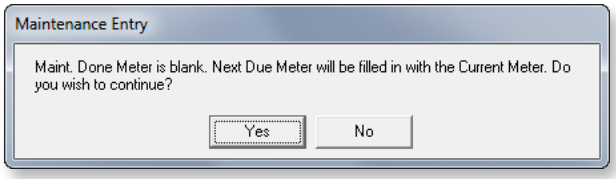
If you choose to edit the records, a form will open allowing you to enter the information. Simply type the values into the editable text boxes (you can only edit the white text boxes). When you are finished, close the window.

If you choose not to supply the information at this time, zeros will be placed in those fields.

If you have not already entered the date on which the maintenance was performed, you will then be asked to fill in the **Maint. Done Date** with today's date:

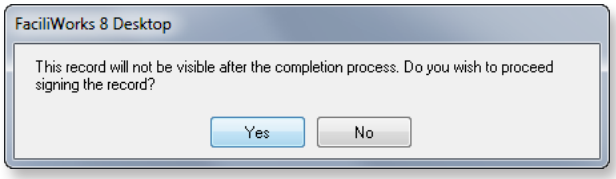

Maintenance Entry
Maint. Done Date is blank. Maint. Done Date will be filled in with today's date Do you wish to continue?
Yes
No

Click **Yes**. Depending on the asset's schedule, you may also receive this message:

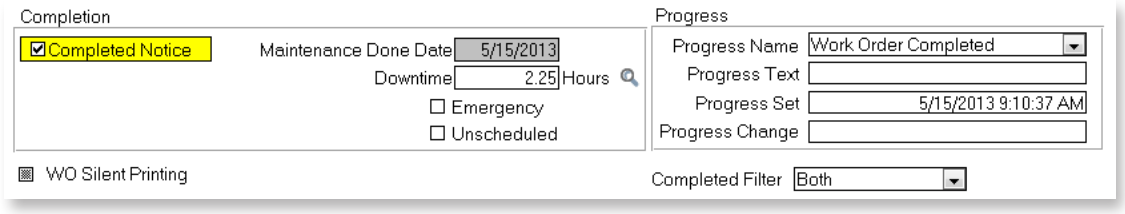

Maintenance Entry
Maint. Done Meter is blank. Next Due Meter will be filled in with the Current Meter. Do you wish to continue?
Yes
No

Click **Yes** or **No**, depending on your preference.

The record won't be visible by default after completion; to view it, unfilter the records. If security is enabled, you will be prompted to go to the **Signature** tab to sign the record:


FaciliWorks 8 Desktop
This record will not be visible after the completion process. Do you wish to proceed signing the record?
Yes
No

Back on the **Information** tab, the **Completed Notice** checkbox is now checked and the **Maintenance Done Date** is filled in. The **Progress Name** is also updated to indicate that the work order has been completed.

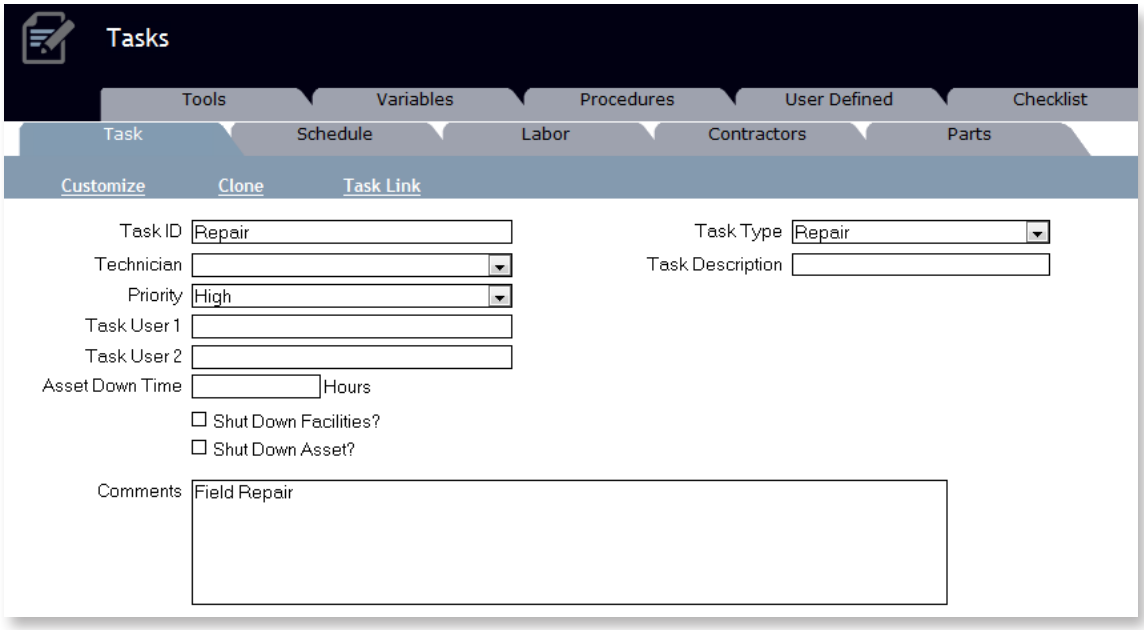


Once the work order is complete, FaciliWorks automatically creates a notification that a work order is to be created for the next cycle. To create the new work order, go to **Auto Create Scheduled Work Orders** or to **Manual Create Scheduled Work Orders** in the **Work Orders** menu.

Unscheduled Work Orders

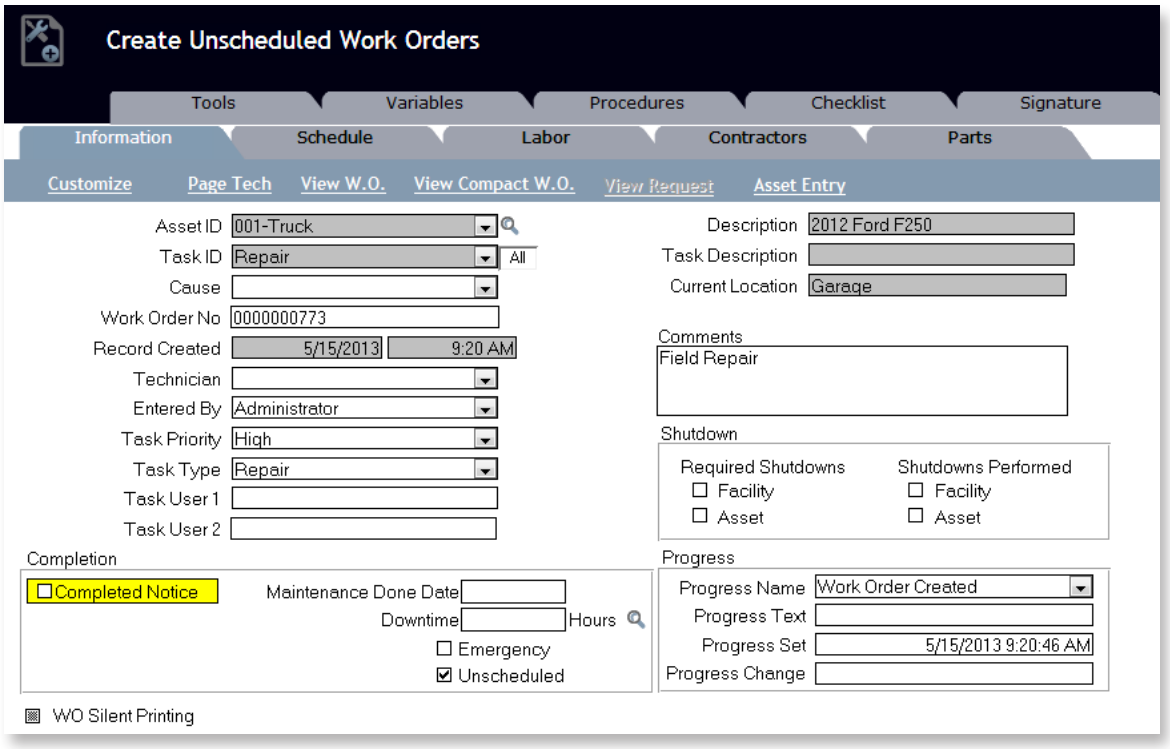
Unscheduled work orders are created for emergency work or other unscheduled maintenance tasks. The most efficient way to create an unscheduled work order is to build a generic repair task and store it in the database. This task can be very general, using Repair as the **Task ID** or it can be general to a type of task such as Electrical Repair, Lighting Repair, Plumbing Repair, Wiring Repair, etc. Each component of the task can be left blank until the repair is required. Components can then be specified as the work order is created.

From the Main Menu, navigate to **Data Administration -> Tasks**. To add a new repair task, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form. You only need to fill in the **Task ID** and **Task Description** to save the repair task in the database. Once you have created a generic repair task and stored it in the database, it can be attached to any asset requiring an unscheduled repair.



There are two ways to create an unscheduled work order: click either **Create Unscheduled Work Orders** or **Edit Work Orders** from within the **Work Orders** menu. The two forms display the same data format.

When using the **Create Unscheduled Work Orders** form, select the asset by using the drop-down list in the **Asset ID** field. Next, select the repair task. In order to choose from all previously entered tasks in the **Task ID** drop-down list, click the **All** button to the right of the **Task ID** field and then click the drop-down list. Any information that you previously entered within **Data Administration -> Tasks** will auto-fill.



When using this form, the unscheduled work order is created before the work is carried out by the technician. Fill in all task component information within each work order tab in the same manner as you did when first creating a task. Notice that the **Unscheduled** checkbox is checked to indicate an unscheduled work order. Once all component information is entered, the work order can be printed and given to the technician to complete the work.

After the work is completed, navigate to **Work Orders -> Edit Work Orders**. Complete the work order as previously instructed in the **Scheduled Work Orders** section.

Chapter Five:
Data Administration

Now that you have gone through the procedures to quickly create scheduled preventative maintenance and unscheduled work orders in the preceding chapters, it is time to populate the data tables for all business operations. From the Main Menu, navigate to **Data Administration**. Here, data is entered for all asset and task records, including associated records for checklists, procedures, contractors, variables and suppliers. Meter readings are also manually updated here.

Before you begin entering records, we recommend that you read **Chapter Three: Program Conventions**, to familiarize yourself with FaciliWorks' basic naming conventions, commands, functions and time-saving shortcuts.

Asset Entry

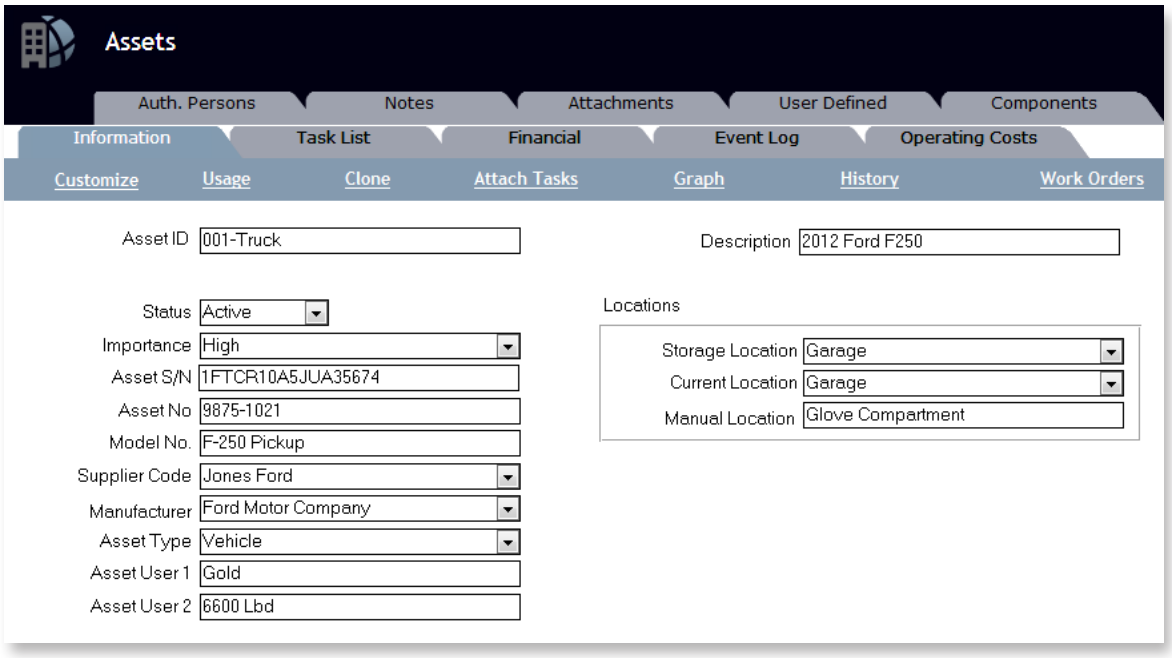
Navigate to **Data Administration -> Assets**. An asset is any item that may require preventative maintenance or tracking of unscheduled work performed – everything in your business that you need to test, replace or service at regular intervals, based on either elapsed time or actual usage. It might include vehicles, machinery, individual components, fixtures and buildings. Enter asset information, define maintenance tasks, attach appropriate maintenance procedures, record financial information, document events that arise, specify operating costs for mobile assets, identify authorized persons for asset usage and arrange components of assets in a tree structure.

Assets – Information Tab

When you navigate to **Data Administration -> Assets**, the **Information** tab is displayed. To add a new asset, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form. Use your mouse or Tab key to move among fields. The **Information** tab describes the asset.

Each asset is recognized by a unique identifier (**Asset ID**) which is primary key. A primary key field is used to establish appropriate relationships between the data tables and is a required field. There are certain restrictions when entering data into the primary key fields:

- ID fields must not be blank.
- Enter a unique value for each record; ID values must not be duplicated in another record. See **Automatic Numbering** for more information.
- ID fields can contain letters, numbers and dashes (-).
- Avoid using / # * ? ! ‘ [ ] or any other special characters in your ID field or other fields, as FaciliWorks considers them to be wildcard characters. Wildcard characters help you search and filter records and set numbering formats. If you must use these characters, such as in “Boiler #1”, then you will need to put brackets around the wildcard character whenever you use it to filter records (for example, enter “Boiler [#] 1”).



Asset ID: Enter a unique alphanumeric identification code for each asset record. You must create a unique ID for each asset in order to store the record in your database. This is a required field.

Description: Enter a brief description of the asset.

Status: Assign a status to the asset. If the **Status** field is not 1 (active), the asset will not be included on scheduled preventative maintenance. This is a required field.

Importance: Assign a priority rating to indicate how important the asset is to your operations.

Asset S/N: Enter the asset's serial number.

Model No.: Enter the asset's model number.

Supplier Code: Use the drop-down list to select the supplier.

Manufacturer: Enter the name of the asset's manufacturer.

Asset Type: Group assets for reporting or analysis purposes based on type. FaciliWorks will create a self-building drop-down list as you enter new types.

Asset User 1 & **Asset User 2**: Enter any additional information about the asset in these fields.

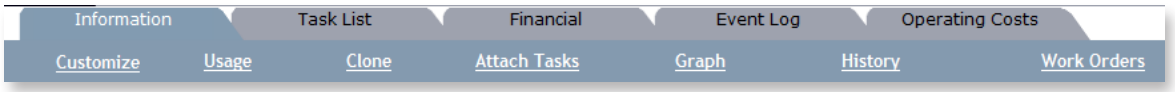
Storage Location: Note the storage location of the asset. FaciliWorks will create a self-building drop-down list as you enter new storage locations.

Current Location: Enter the asset's current location. An employee name will appear here if the asset is issued.

Manual Location: Enter the location of the asset's user manual.

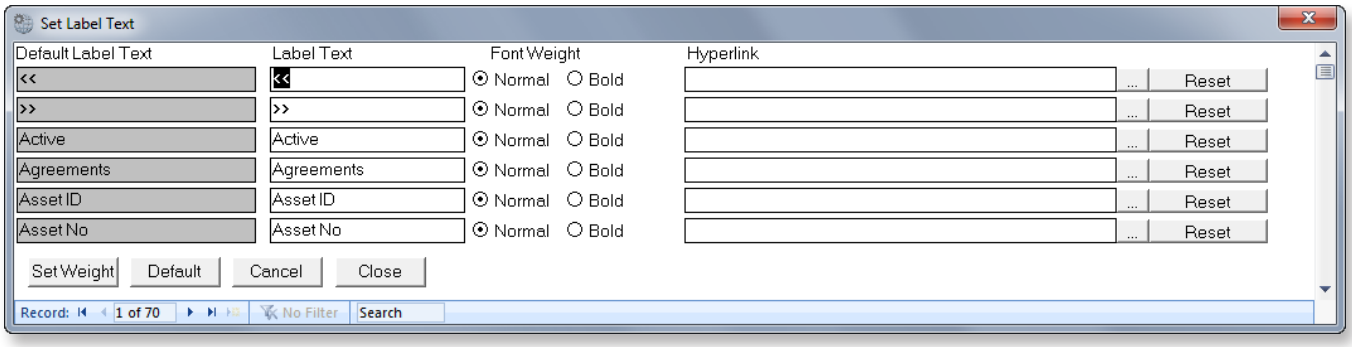
Information Tab Command Buttons

The command buttons are located just below each tab name in the green bar. The buttons link to the accessible operations that can be performed for the active form.



Customize Button

Within each FaciliWorks form is a **Customize** button**,** allowing each form label (**Label Text**) to be modified.

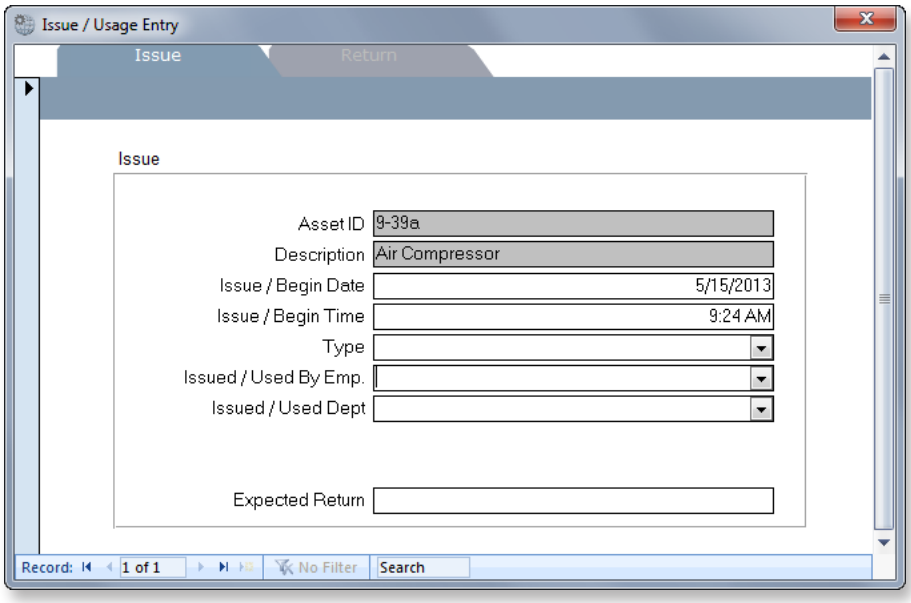


Return any **Label Text** to its original state by clicking the **Reset** or **Default** buttons. Fonts can be set to normal or bold. To set font weight, click the appropriate **Normal/Bold** radio button next to the form label or click **Set Weight** to set all labels to bold.

A label can be set as a hyperlink. Use the browse button **[...]** to navigate to the result location or type the location in the **Hyperlink** textbox.

Usage Button

Click **Usage** to issue the asset to a person authorized to use it or to return the asset to storage.



FaciliWorks allows you to track all asset issues and returns. These issue/return records are especially useful in manufacturing; assets, tools or assemblies are loaned out for periods of time or assigned to a particular job, then serviced and/or returned to storage and safekeeping. By tracking this information, you can identify which employees or departments use particular assets and how often they use them.

Another purpose of these records is to track usage days and operating cycles for assets whose maintenance schedules are based on actual days or cycles used instead of elapsed calendar days. You must use issue tracking records when maintenance schedules for an asset are based on metered usage or cycles.

Use the **Issued/Used By Emp.** and/or **Issued/Used Dept** fields to establish manufacturing traceability. For example, if you find that the asset is out of tolerance, you can immediately generate a recall report listing all parts, assemblies or products that you may have manufactured incorrectly.

To issue an asset, click the **Issue** tab and then click the **New Blank Record** button. To return an asset, locate its issuance record and then click the **Return** tab. You cannot enter a **Return** record for an asset that does not have an **Issue** record – this is why the **Return** tab is inaccessible (grayed out) in the screen shot above – the issuance has not yet been completed. If you are reassigning the asset, you must create a new **Issue** record.

The fields in the **Issue/Usage Entry** form function as follows:

Asset ID and **Description**: These fields automatically show the **Asset ID** and **Description** for the current record.

Issue/Begin Time: Enter the date on which you issued the asset to a job or the date on which usage cycles will begin being counted. The current date automatically appears in this field.

Type: Use the **Type** field to indicate the reason you are issuing the asset. You can enter a code or a description in this field. It's important to enter this information consistently, per your identification system, so that you can later create reports that list your asset by the type of issuance. When you enter a code or description, FaciliWorks adds it to the **Type** drop-down list for future selection. Some examples of issuance types are milling, grinding, delivery, production, assembly, inspection, packaging, cost center, plant, job number or customer name.

Issued/Used by Emp.: Enter the name of the employee who is authorized to use the asset and to whom the asset is being issued.

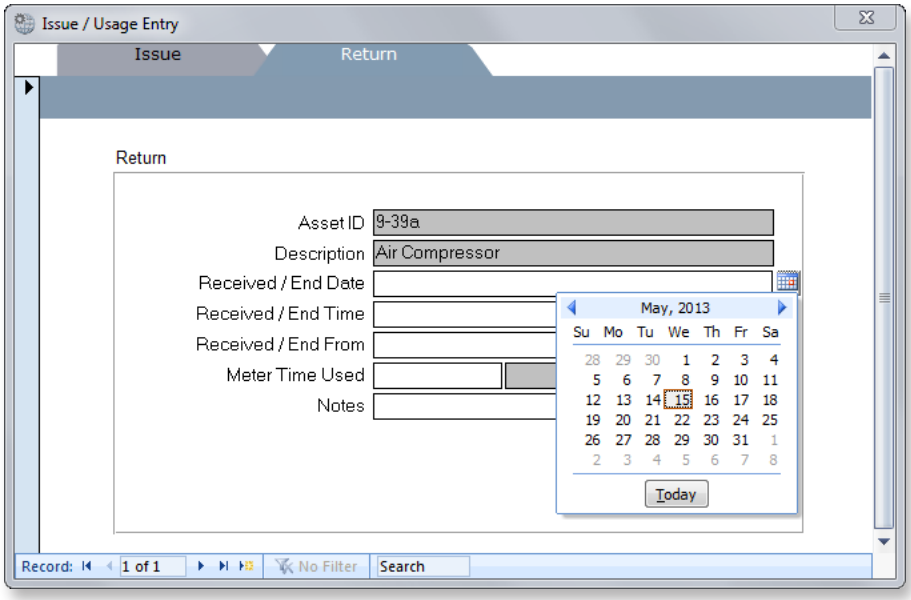
Issued/Used Dept: Enter the name of the department, job number or customer that will require the asset.

Expected Return: Enter the date on which you expect the borrower to return the asset.

When you initiate the issuance record, FaciliWorks auto-fills the **Issue/Begin Date** and **Issue/Begin Time** fields; however, you may edit these fields if necessary. The **Current Location** field in the asset record is also modified; the modified description consists of the **Issued/Used By Emp.** field and the **Issued/Used Dept** field, separated by a slash character (e.g., "3791/ Shipping").

Once an asset has an **Issue** record, the **Return** tab can be accessed. While on the desired issuance record, click the **Return** tab to record its return.

Received/End Date: Enter the date on which the borrower returned the asset. Click the **Calendar** icon to the right of this field to display the calendar. Click **Today** to enter the current date or click the appropriate date on the calendar.



Received/End Time: Enter the appropriate time or click in the empty field and the calendar icon will move to the right of this field and expose a grey square button to the right of the **Received/End Date** field. Click the grey button to enter the current date and time into the **Received/End Date** and **Received/End Time** fields.

Received/End From: Use the drop-down list to select the person, department or company returning the asset. If the name isn't on the list, enter it here. FaciliWorks adds the typed information to the **Received/End From** drop-down list for future selection.

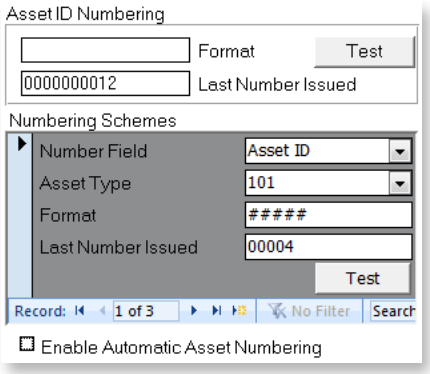
Meter Time Used: Enter the number of times the borrower used the asset while it was issued.

Notes: Enter any special information regarding the asset or its use.

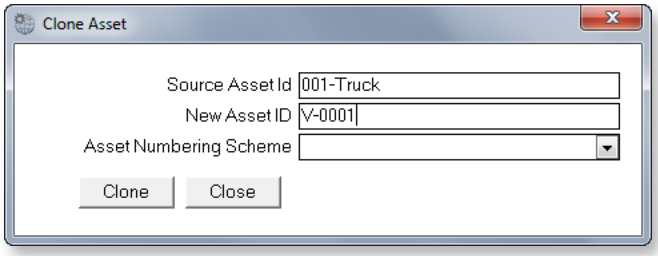
When you save the **Return** record, FaciliWorks automatically updates the asset's **Current Location** to be its **Storage Location**.

Clone Button

To copy an asset record and its set of tasks with all task components, click the **Clone** button on the **Assets -> Information** tab. If the **Asset Type** of the asset being cloned has been given an **Asset Type Numbering Scheme**, then FaciliWorks will suggest the next number in the sequence for that **Asset Type Numbering Scheme** by auto-filling the **New Asset ID** text box. Otherwise, the application will suggest the next number in the **Asset ID Numbering Scheme**. A numbering scheme different from the default scheme can be selected. You may use the suggested **New Asset ID** or enter a new one. These numbering schemes are set up within the **Setup -> Settings -> Auto Numbering** tab:



If there is no numbering scheme set up, then the **New Asset ID** text box will be blank, allowing you to manually enter the new value. Once you've typed the **New Asset ID**, click **Clone** to clone the asset. To clone the same asset record again, enter another **New Asset ID** and click **Clone** again.

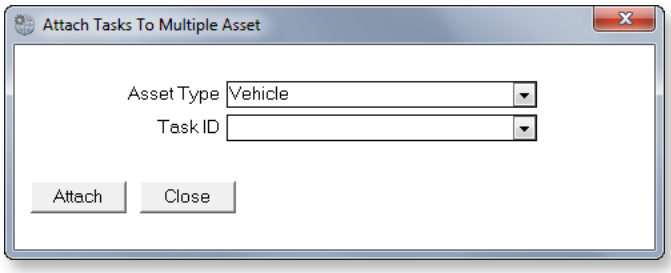


Click **Close** when you're finished. The last cloned record will be displayed in the **Asset -> Information** tab.

Attach Tasks Button

The **Attach Tasks** button on the **Assets -> Information** tab lets you to attach a task to all assets of the same asset type. The task will not be attached to the current asset record if the **Type** field is blank – you will be prompted to enter an **Asset Type** for a blank **Type** field.

When you click the **Attach Tasks** button for the current asset, the **Attach Tasks to Multiple Assets** window is displayed. This window displays the **Asset Type** of the current record. Select a **Task ID** from the drop-down list and then click the **Attach** button to assign this task to every asset record of this **Asset Type**.



FaciliWorks will then notify you what action will take place and ask if you want to proceed:

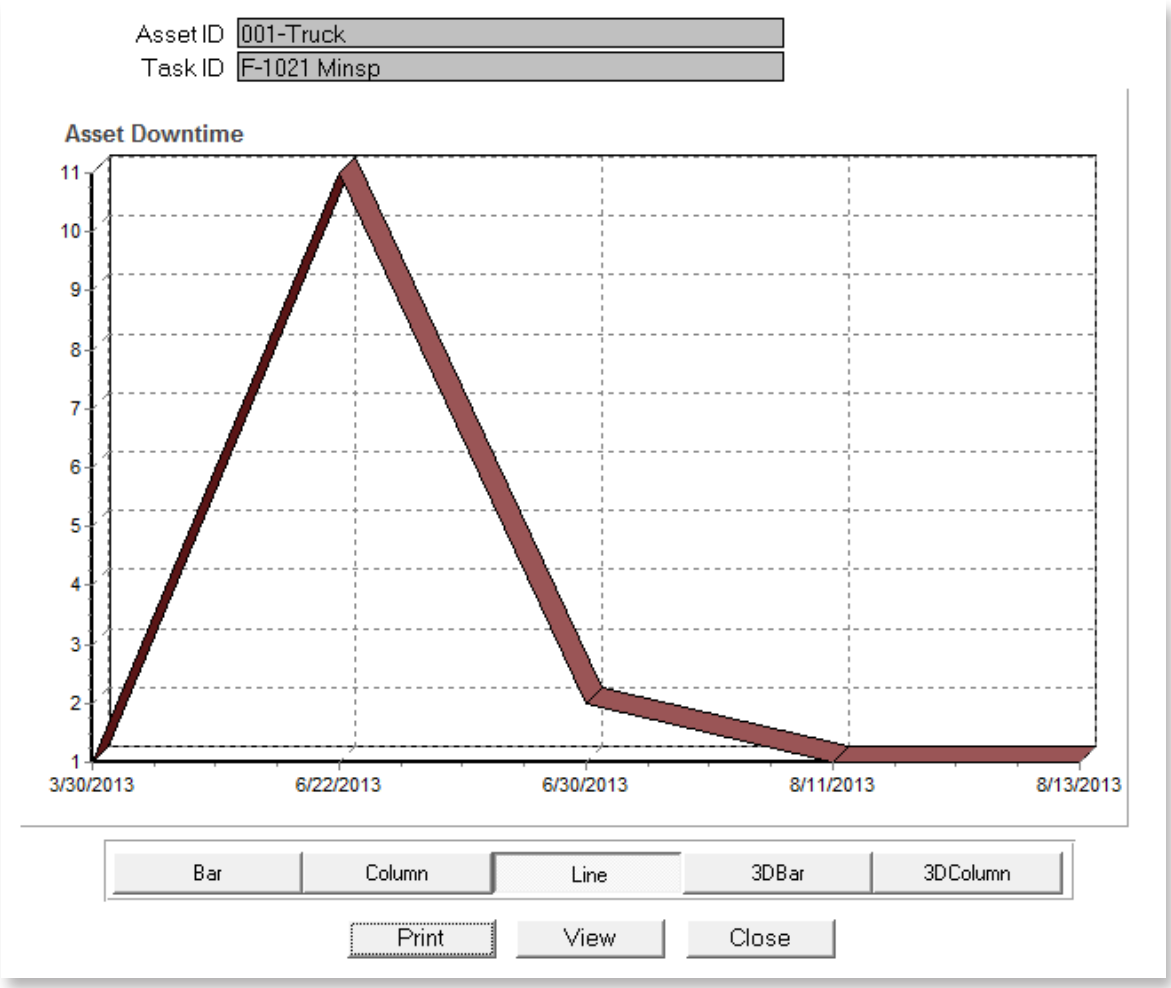
Attach Tasks
If you attach a new task to this Asset record, it will replace any previously attached tasks that have the same task ID as the new task. Do you wish to continue?
Yes
No

Clicking **Yes** will complete the action and display the confirmation window:

Click **OK** to close the window.

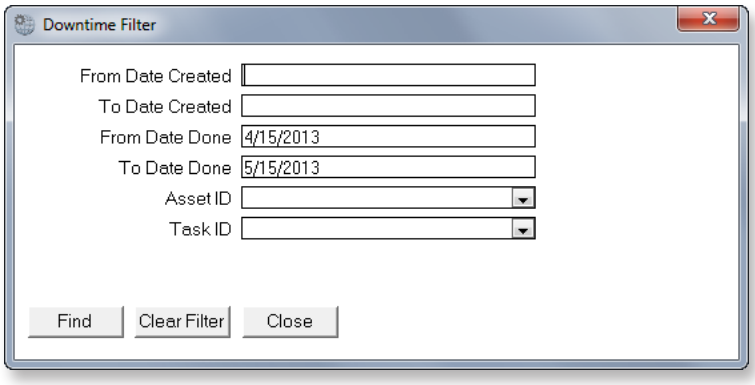
Graph Button

To view or print an **Asset Downtime** graph, click the **Graph** button on the **Assets -> Information** tab. By default, FaciliWorks will graph the entire downtime history for all tasks performed on the asset. Select the type of graph for your display by clicking the appropriate button (Bar, Column, etc.).



To see a print preview before you print, click **View**. To print a graph, click the **Print** button. To return to the **Assets -> Information** tab, click **Close**.

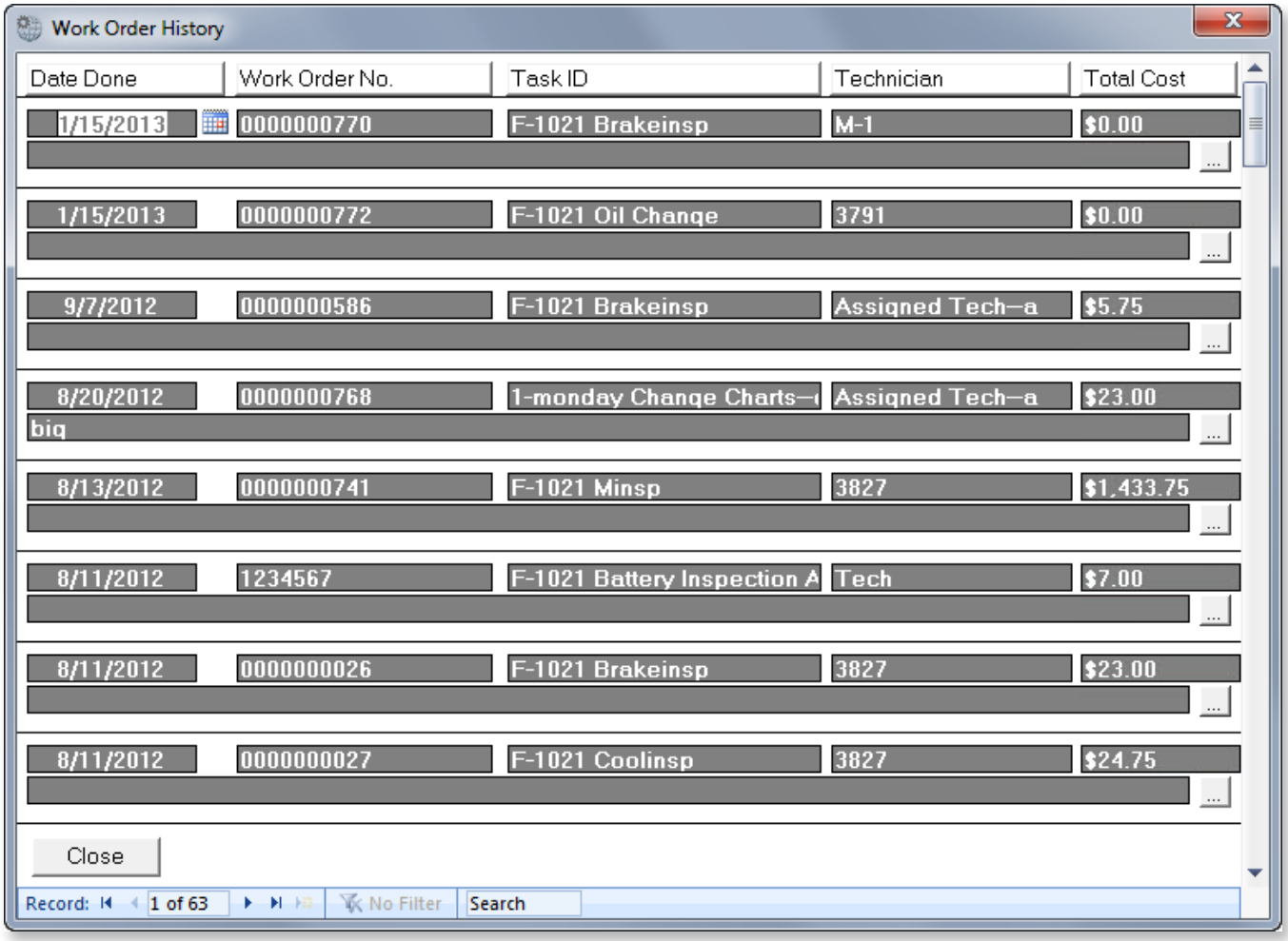
To see an Asset Downtime graph for a specific date range, you'll need to access the graph through **Reports and Graphs**. First, close the **Assets** window by clicking the **File** tab on the ribbon and then clicking **Close**. This returns you to the Main Menu. From the Main Menu, click **Reports and Graphs**, select **Asset Graphs** from the list and then select **Asset Downtime**. The **Downtime Filter** window displays:



Enter the desired dates and select the **Asset ID** from the drop-down list. Click **Find**.

History Button

To view a summary of the work order history for the current asset, click the **History** button. The **Work Order History** window displays a review of the maintenance history for the asset which includes the completed date, work order number, task performed, technician completing the work and total cost.



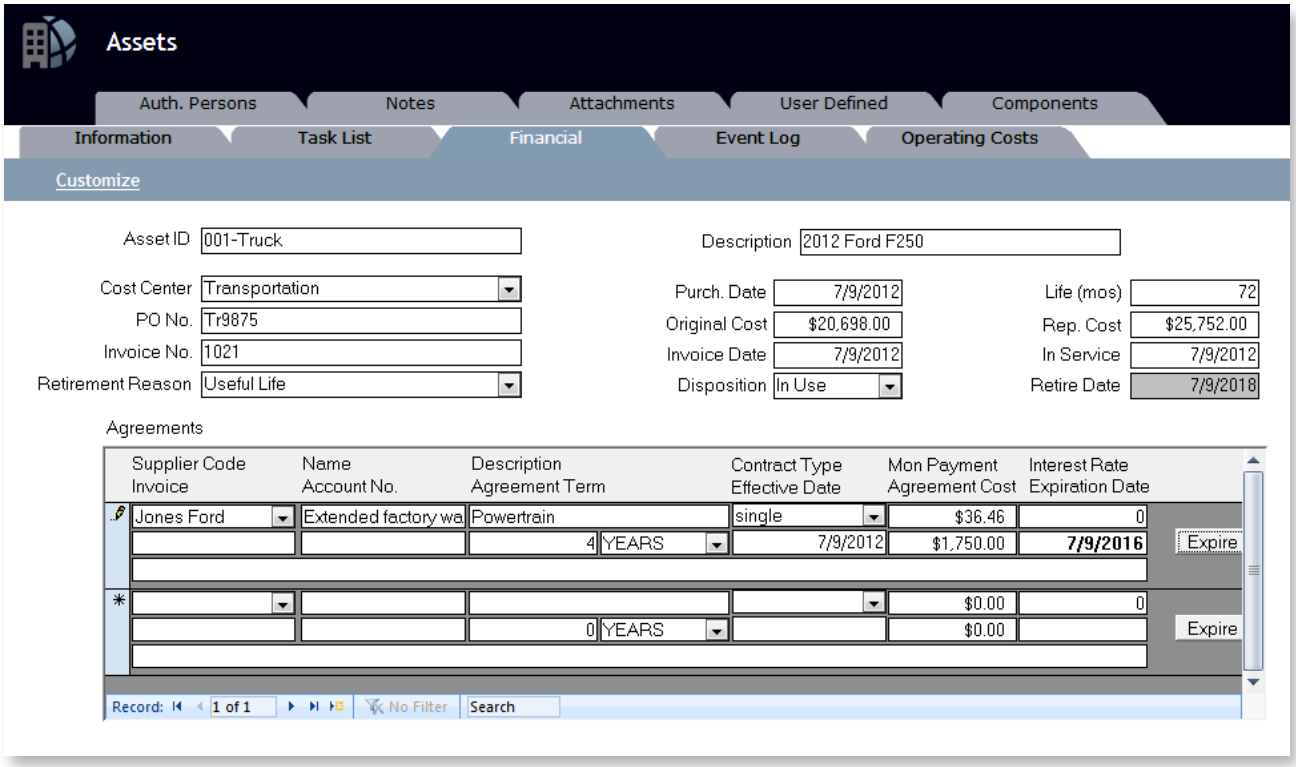
This window is designed for viewing purposes only; you cannot edit information here or print from this window. To view the work order details and print the work order, click the **[...]** button to the right of the record; the record opens in a separate **Edit Work Orders** window.

Work Orders Button

In the **Assets -> Information** tab, click the **Work Orders** button to go directly to the **Edit Work Orders** window; the records are automatically filtered for the records that pertain to the asset you were viewing.

Assets – Financial Tab

Financial information for each asset is entered here, i.e., purchase records and contract agreements.



The fields in the upper portion of the form are described as follows:

Asset ID and **Description**: The current record's **Asset ID** and **Description** appear in these fields.

Cost Center: The specified cost center for financial reports grouping.

PO No.: Purchase order number.

Invoice No.: Invoice number.

Retirement Reason: The reason for retiring the asset.

Purch. Date: The date on which the asset was purchased.

Original Cost: Original cost of the asset.

Invoice Date: Invoice date.

Disposition: When the asset is in use.

Life (mos): Number of months of the asset's useful life.

Rep. Cost: Replacement cost of the asset.

In Service: Date the asset was put into service.

Retire Date: Date the asset is to be retired. This field auto-fills based on the values entered in the **Life (mos)** and **In Service** fields.

The **Agreements** pane captures information regarding terms and contract information and other relevant information on any maintenance agreements or other contracts pertaining to the asset.

Supplier Code: Enter the name of the supplier or select a supplier from the drop-down list.

Invoice: Enter the invoice number for the service agreement.

Name: Enter the title of the service agreement.

Account No.: Enter the account number of the service agreement.

Description: Enter a description of what the service agreement covers.

Agreement Term: Enter the term of the agreement in months or years.

Contract Type: Choose the type of contract from the drop-down list or enter a type.

Effective Date: Enter the date the agreement went into effect.

Mon Payment: Enter the monthly payment amount specified in the agreement.

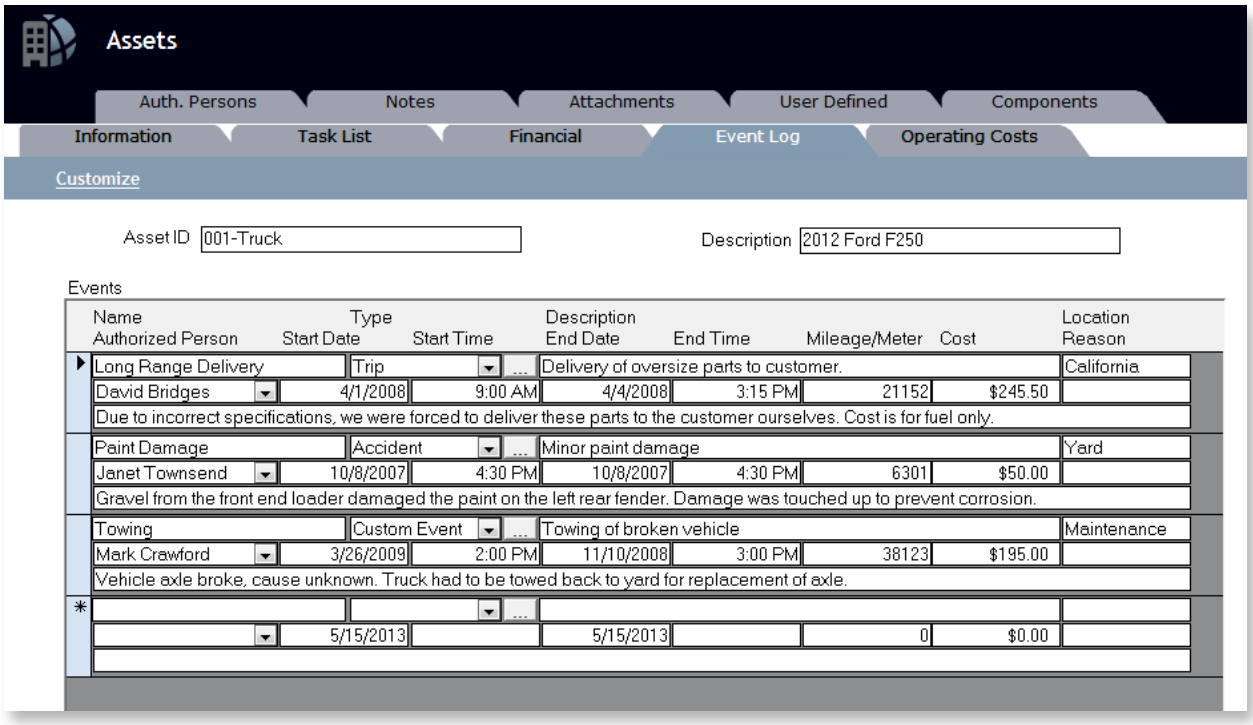
Agreement Cost: Enter the total cost of the agreement.

Interest Rate: Enter the interest rate specified in the agreement.

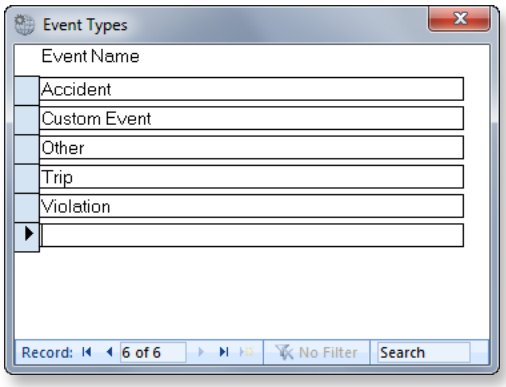
Expiration Date: Click the **Expire** button to automatically compute the expiration date of the agreement based upon the date entered in **Effective Date** and the term entered in **Agreement Term**.

Assets – Event Log Tab

Use this form to enter events that involve a particular asset. Be sure that entries in the **Name** field are unique. The event **Type** must be selected from the drop-down list.



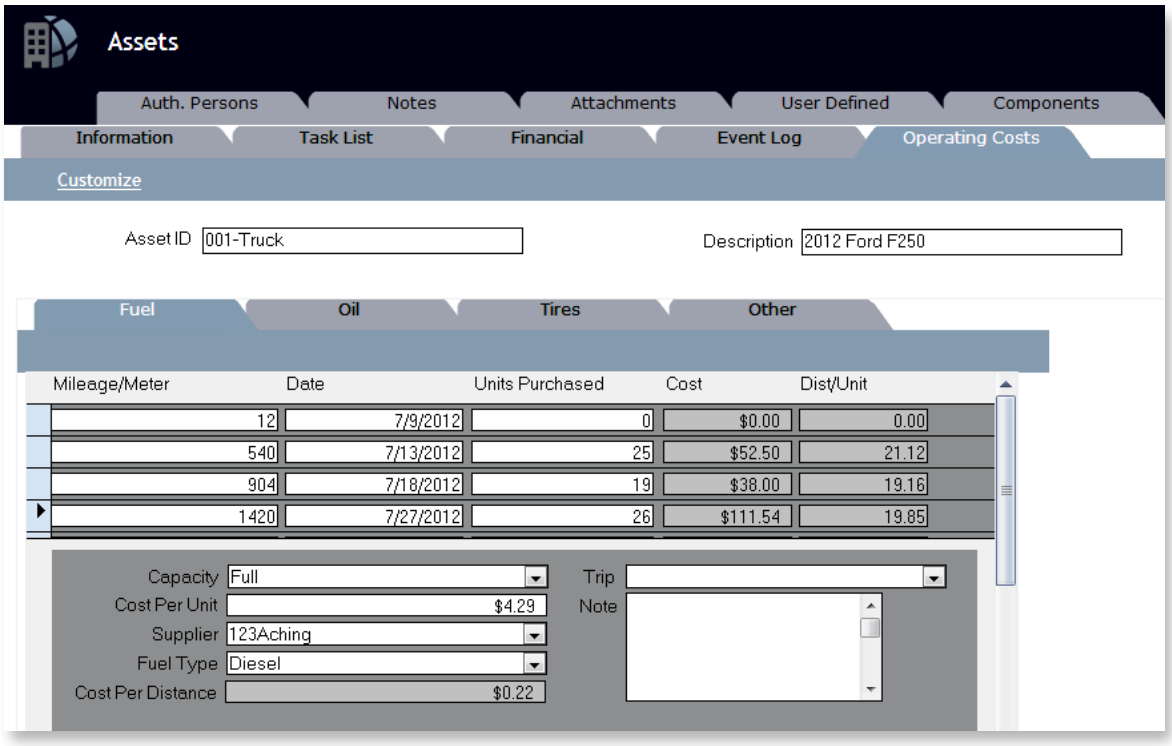
Event types can be created or edited by clicking the **[...]** button to the right of the **Type** field. The **Event Types** window will appear:



Enter the new event **Type** in the empty field at the bottom of the list; as you enter the event **Type**, a new, blank field appears beneath it to allow you to enter another one.

Assets – Operating Costs Tab

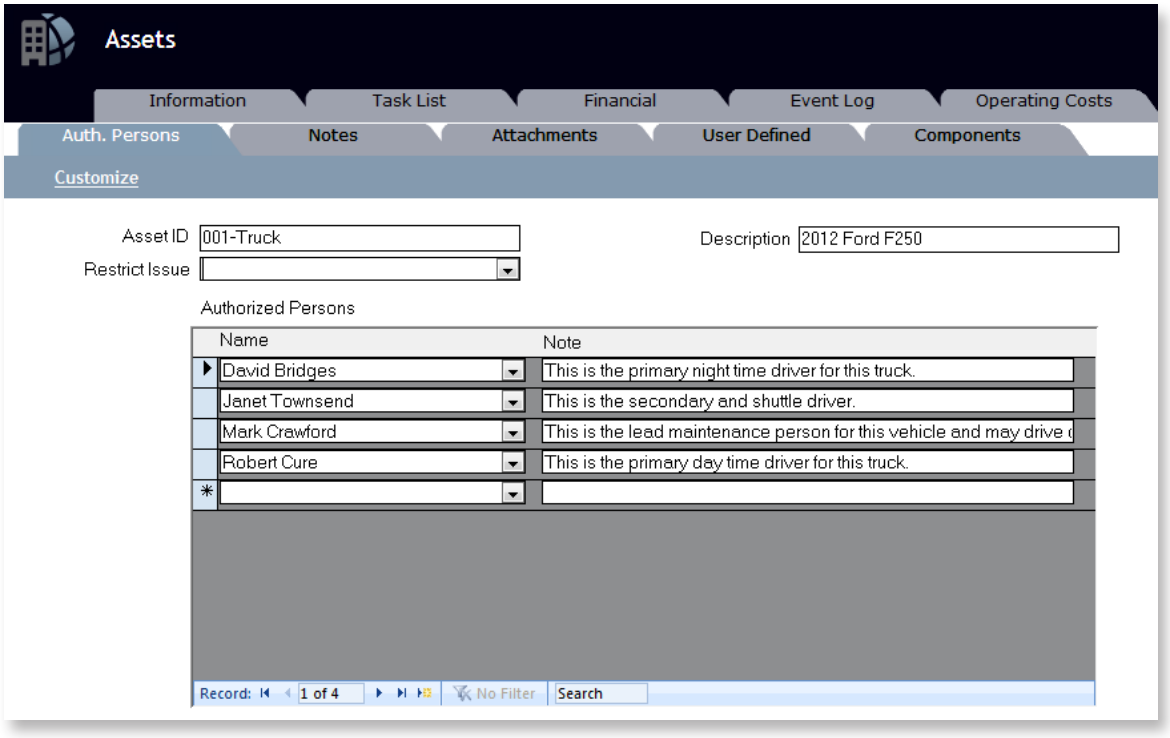
Use this form to capture asset operating costs. This form contains sub-tabs to enter meter readings and other detailed information relating to **Fuel**, **Oil**, **Tires** and **Other** costs. Mileage entries cannot overlap and date entries must be consecutive.



The fields below the table rows showing **Capacity** and **Costs** are linked to the row data. Click the grey box to the left of a row and the fields below will reveal **Capacity** and **Cost** information for that row.

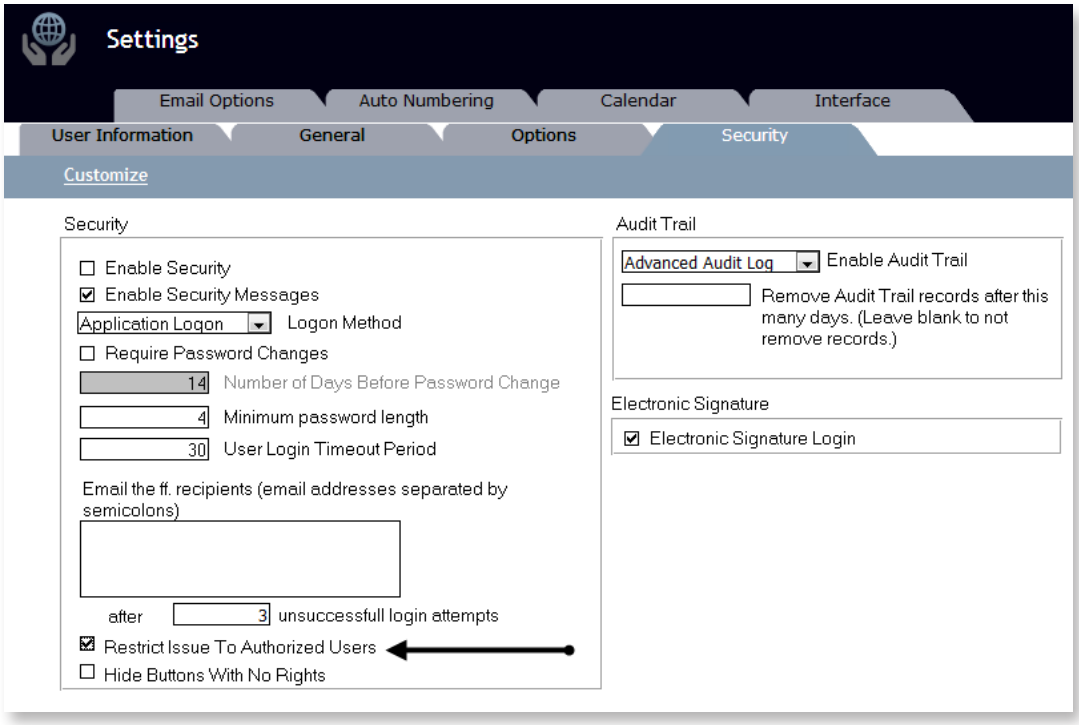
Assets – Auth. Persons Tab

Use this form to enter the names of persons authorized to use the asset.



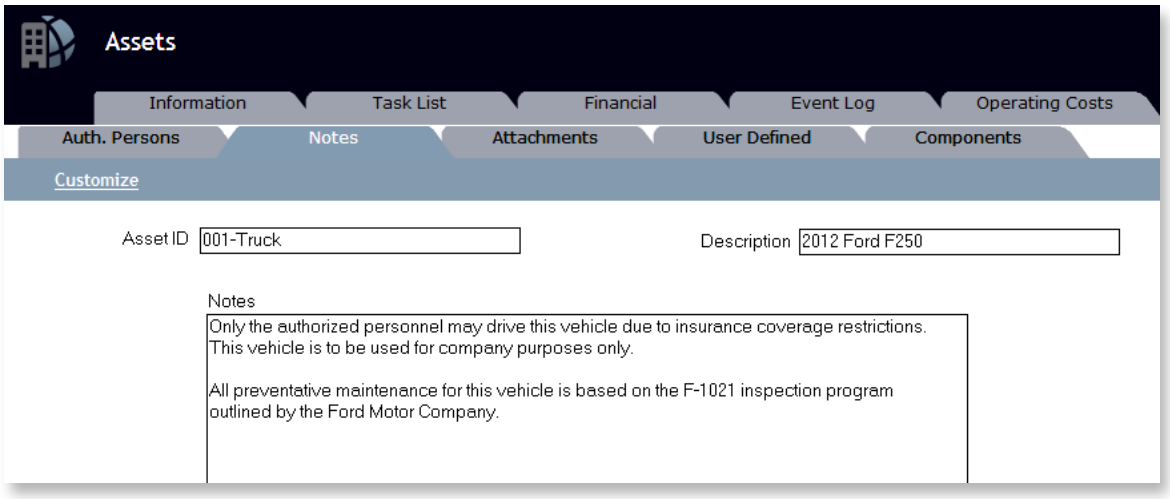
To add a staff member to the **Authorized Persons** list, select a name from the **Name** drop-down list and type any applicable notes in the corresponding **Note** field. When you select a **Name**, a new blank row of fields appears beneath it, allowing you to enter another staff member.

Use the **Restrict Issue** drop-down list to indicate whether the asset is **Restricted** to persons on the **Authorized Persons** list or **Not Restricted**. Selecting the third option, **Program Default**, means that FaciliWorks will behave according to the preference settings in the **Setup -> Settings -> Security** tab:



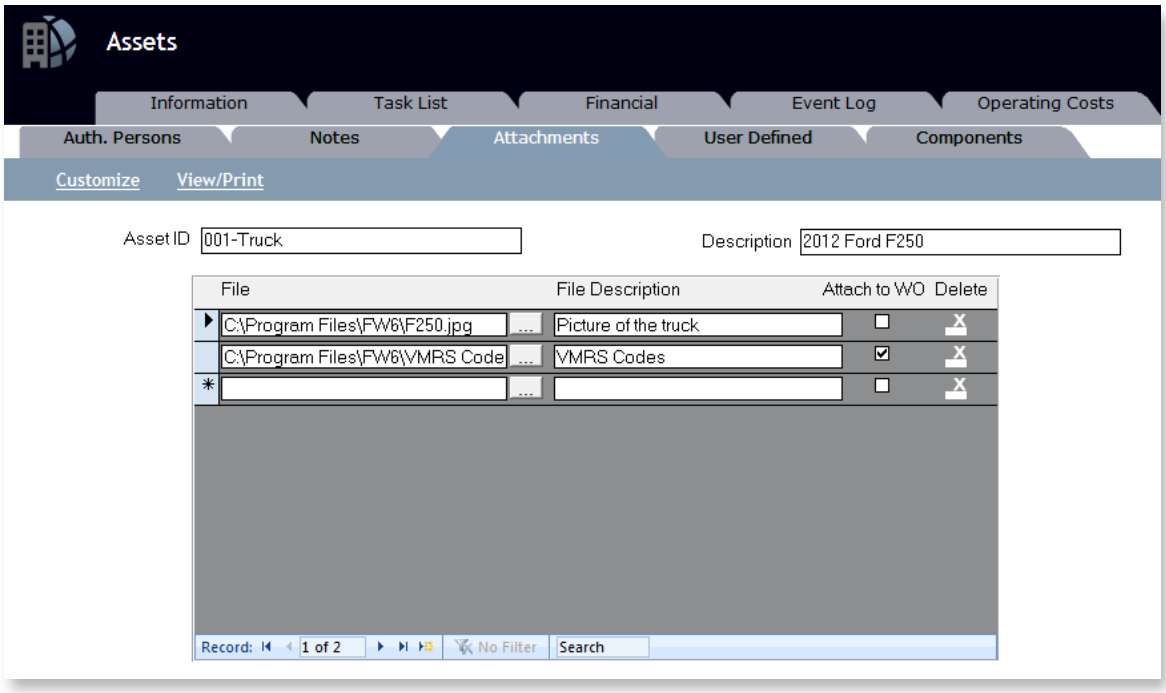
Assets – Notes Tab

Use this form to enter or copy and paste text that applies to the asset. There is no limit to the amount of text you can enter in the **Notes** field.



Assets – Attachments Tab

On the **Attachments** tab, you can attach pictures, maps, PDF files, HTML pages and other file formats to your asset. You also have the option to print the attachments along with your work orders. To do so, check the **Attach to WO** checkbox.



Note: You can use various file formats as long as you have a viewer on your system that supports each format. For example, you would need to have Adobe Acrobat Reader installed on your computer to be able to view PDF files.

Asset ID and **Description**: The current record's **Asset ID** and **Description** appear in these fields. These fields will auto-fill from fields on the **Information** tab.

File: Enter the full path to the file you wish to attach or click the **[...]** button to locate and select the file. Upon selecting the file, the full path to the file will populate the **File** field.

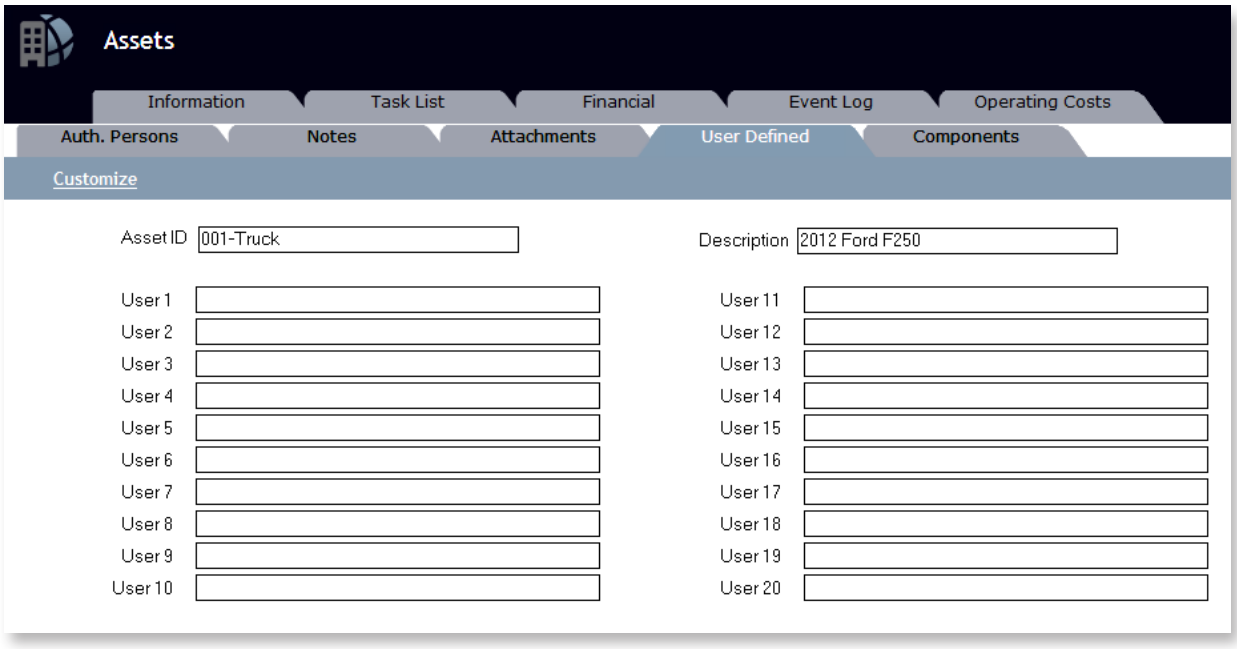
File Description: FaciliWorks will auto-fill this field with the type of file attached. This information can be overwritten, if desired.

Attach to WO: Check the checkbox beside each file that you want to include in printed work orders.

View/Print button: Click this button to open the file for viewing or printing. FaciliWorks will open the file with the Windows default file type settings as registered. If no match is found, you will be prompted to select an appropriate program.

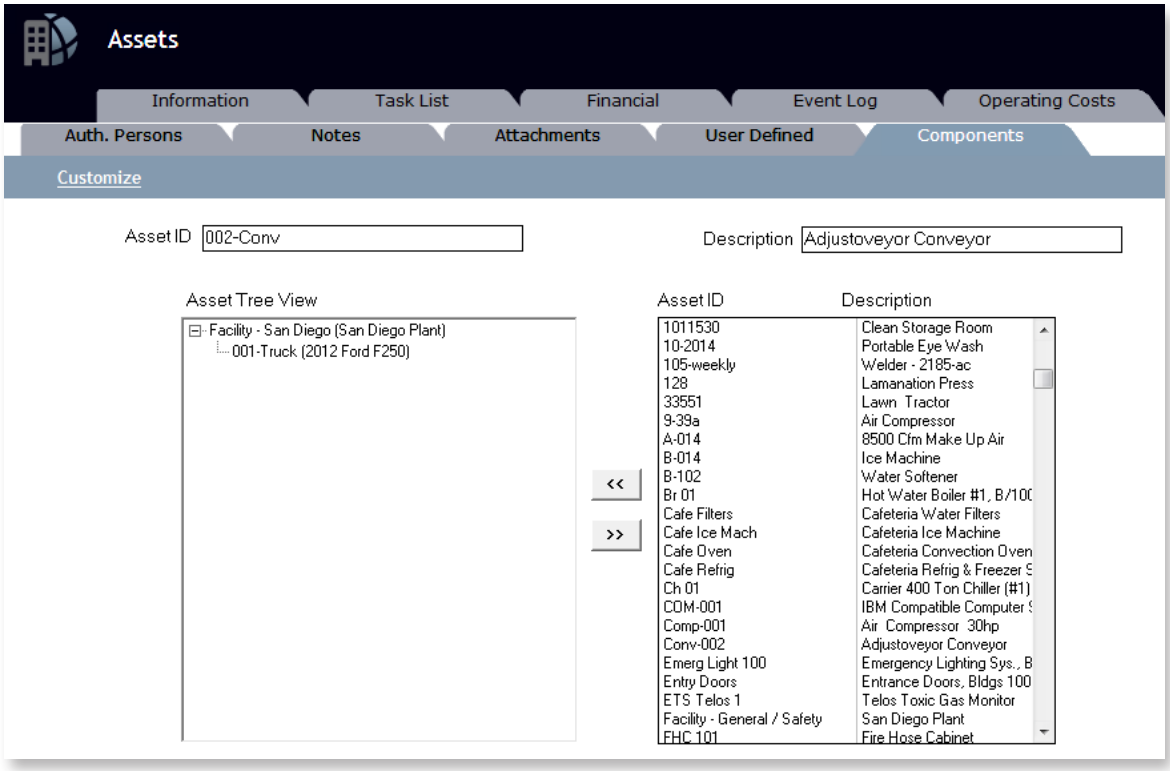
Assets – User Defined Tab

This form gives you more flexibility as it provides 20 user-definable fields to use in your record keeping and reporting. The field labels can be customized by clicking the **Customize** button in the upper left corner of this form. The field types can also be customized by selecting the appropriate option from the **Field Type** list under the **Asset Custom** tab in the **Settings** menu; the field can be defined as a text field, a date field or a drop-down list. Please see the **Program Setup** chapter for more information about changing field types.



Assets – Components Tab

This form displays asset relationships. Components can be easily attached to each other by first selecting the parent component from the **Asset Tree View** pane on the left; selecting a child component from the **Asset ID** pane on the right and then click the **<<** button in the middle to create the link. To break the relationship, select the child component on the left and then click the **>>** button.



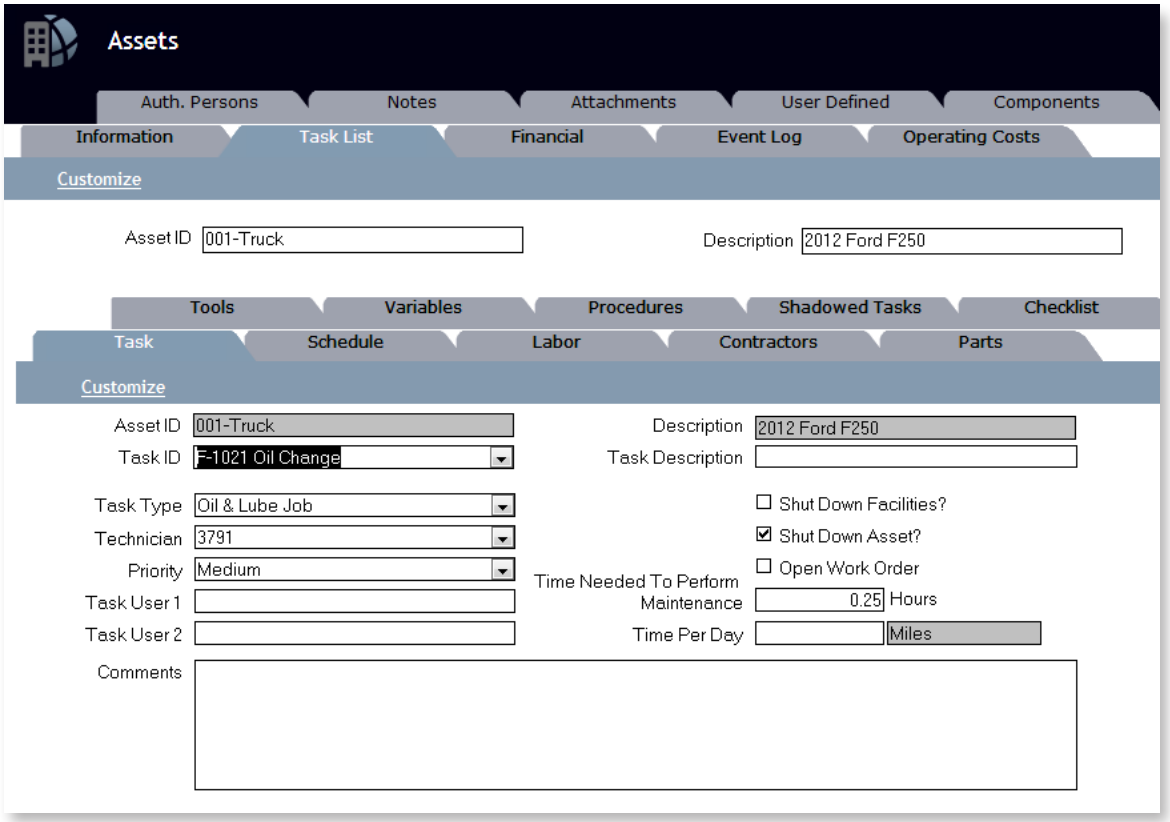
When components are linked as shown here, any computation done to a child component, such as meter readings, cost computation, due dates, etc. will have an effect on the total computation for the parent component. For example, for a truck, its engine might be a child component. A part of the engine's regular maintenance might be changing the oil at regular intervals. When the cost of changing the oil varies, FaciliWorks automatically recalculates the overall cost of maintaining the truck.

Assets – Task List Tab

An asset can have one or more tasks associated with it. Each task consists of one or more components and is represented by the tabs in the **Task List**. Each component tab captures information about the task including Schedule, Labor, Contracts, Parts, Tools, Variables, Procedures, Shadowed Tasks and Checklists. Each of these task components will be described in the sections below.

Task List – Task Sub-tab

The **Task List -> Task** sub-tab allows you to specify information about the work (preventative maintenance) that will be performed on the asset.



Tasks that are performed on more than one asset are typically entered into the database under the **Tasks** submenu prior to attaching them to the assets. When you attach a task, all of its components are also attached. Entering a task in this manner allows you to enter the data once, and then use it repeatedly as necessary. Once attached, task information can be modified specifically for the asset.

All tasks previously entered will be available for selection in the drop-down list of the **Task ID** field. If the task is specific to one asset only, task information can be entered into the database here. If the task record is only entered here in the **Assets -> Task List -> Task** sub-tab, the task will not be available to any other assets.

Note: If you change a task in this form, FaciliWorks considers those changes specific to the current asset record only. Your changes will not appear in any other asset records linked to that task.

Asset ID and **Description**: These fields are auto-filled from data on the **Information** form.

Task ID: Select an existing **Task ID** from the drop-down list or create a new task by entering a unique **Task ID**.

Task Description: Enter a description of the task. This field can only be edited in the **Asset Entry** and **Task Entry** modules. Otherwise, this field is read-only.

Task Type: Enter a new type or select an existing type from the drop-down list.

Technician: Select a technician from the list of active employees or enter a new technician.

Priority: Assign a priority to the task (optional). This entry can consist of numbers, characters or a combination of both.

Task User 1 and **Task User 2**: Use these two fields to store additional information about the task. See the **Program Settings** chapter for information about changing these and other field labels. If you need more than two user-defined task fields, you can use the **User Defined** tab.

Comments: Use this field to store additional information about this task.

Shut Down Facilities: Check this box to indicate that the task requires the facility to be shut down during maintenance.

Shut Down Asset: Check this box to indicate that the task requires the asset to be shut down during maintenance.

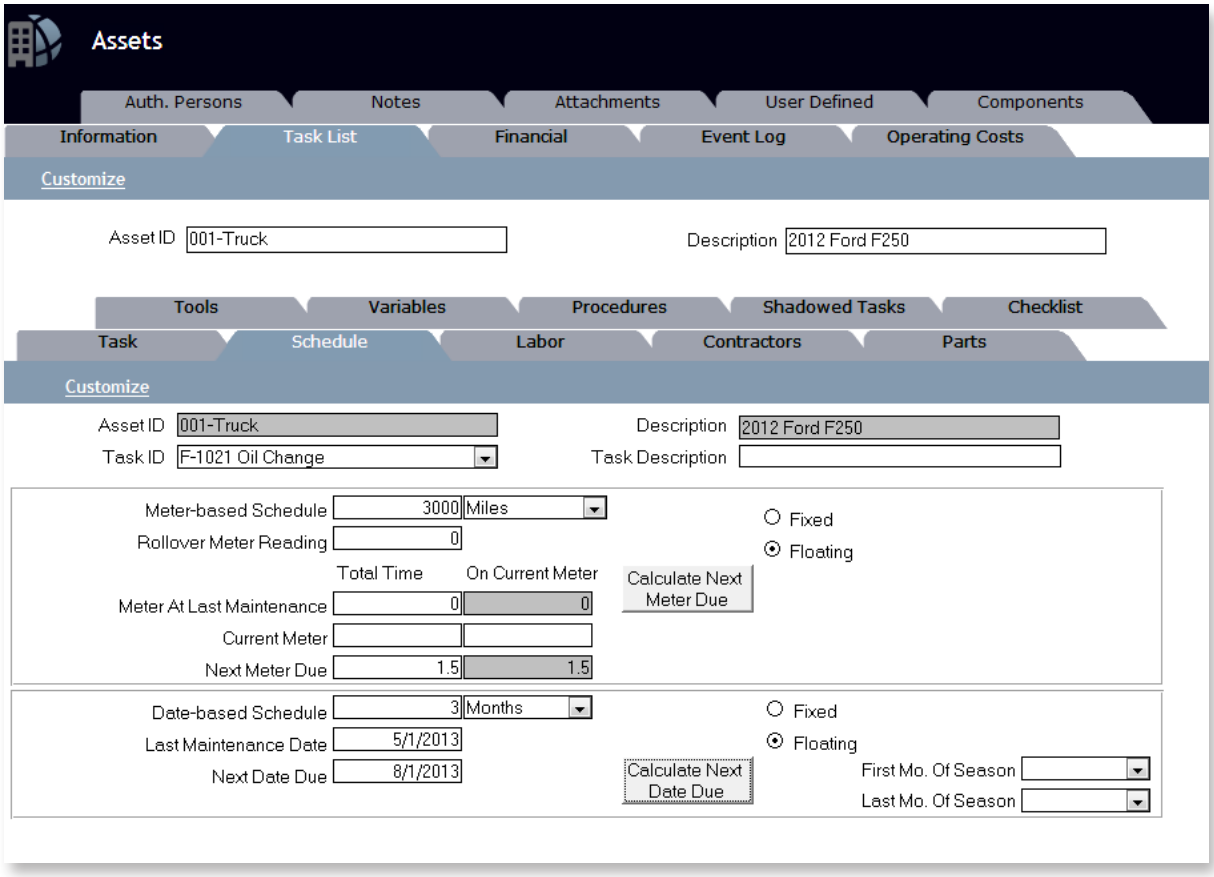
Open Work Order: This box contains a checkmark if you currently have an open work order for this asset task. You can change this field by unchecking the box if you don't have an open work order for this task or check the box to show that it does have an open work order.

Time Needed to Perform Maintenance: Enter the number of hours that the technician should need to perform this task.

Time Per Day: This feature directly relates to the **Calendar** feature found under **Work Orders**. Use this field to calculate when maintenance will be due based upon the meter reading. For example, Task 01 is associated with Asset 01, which has a meter-based schedule of 100 hours and the **Time Per Day** is set to 20 hours. This means that every 5 days, the task will be due.

Task List – Schedule Sub-tab

Use the **Schedule** sub-tab to create scheduled preventative maintenance on your assets. After you initiate the schedule here, FaciliWorks will take over with a continuing maintenance schedule. You can schedule asset maintenance based on meter readings and/or based on calendar date.

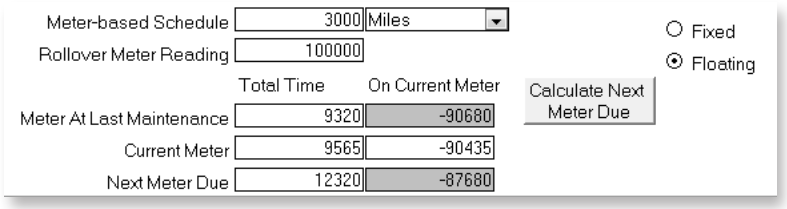


Meter-based Schedule

To set up the **Meter-based Schedule**, enter the number of units in the left-hand **Meter-based Schedule** field and then use the drop-down list in the right-hand field to select the unit type. Unit types include minutes, hours, days, cycles, miles and kilometers.

Rollover Meter Reading: The point at which the asset's meter reaches its maximum reading and rolls over to zero. This value is used to calculate usage remaining on the scheduled cycle.

Meter at Last Maintenance, **Current Meter** and **Next Meter Due** each have two entry fields. The fields on the left (in the **Total Time** column) reflect the accumulated meter value; the fields on the right (in the **On Current Meter** column) reflect the value of the current meter reading until rollover.



In the example here, the **Meter At Last Maintenance** is 9,320 miles. FaciliWorks calculates a total of 90,680 miles until rollover. The **Current Meter** reading shows 9,565 miles which is a total of 90,435 miles until rollover.

Based on the information entered thus far, FaciliWorks will calculate the **Next Meter Due** when you click the **Calculate Next Meter Due** button. Scheduled units are added to the meter at last maintenance reading to obtain this value. In the example, the last maintenance reading of 9,320 is added to the scheduled units, 3,000, to obtain the 12,320 reading for the next scheduled maintenance. This leaves 87,680 units until the meter rollover point.

If the **Next Meter Due** text box is red, the maintenance is overdue.

As you update the meter readings, the usage remaining before next maintenance is recalculated. The meter reading can be updated in one of two ways: change the **Current Meter** value here on the **Task List -> Schedule** sub-tab or click the **Update Meter Readings** option in the **Data Administration** menu.

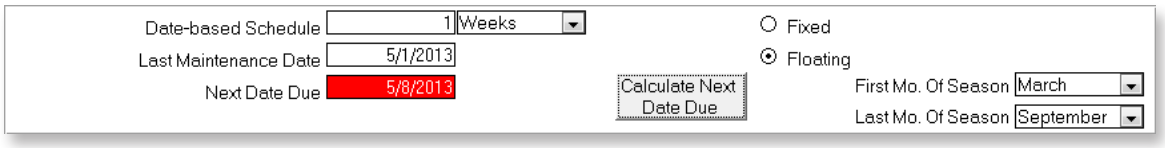
Date-Based Schedule

When performing the task according to a calendar schedule, enter the interval number in the left-hand **Date-based Schedule** field and select the unit of time in the right-hand **Date-based Schedule** field. The available units are days, weeks, months, years, EOM (End of Month) and DOM (Date of Month). EOM is similar to months, but it advances the **Next Date Due** to the last valid day of the month (the last valid day of each month will be determined by your skip days and/or dates - see **Chapter Thirteen: Program Setup** for more information about skip dates). DOM advances the **Next Date Due** to the specified day of each month.

Enter the **Last Maintenance Date** and then click the **Calculate Next Date Due** button. FaciliWorks will automatically calculate the **Next Date Due** based on the date-based schedule entry. If the **Next Date Due** text box is red, the maintenance is overdue.

Seasonal Maintenance

The **First Mo. of Season** and **Last Mo. of Season** fields are used to create a seasonal schedule. A season is the portion of the year over which a task will be performed. For example, in the spring and summer, the lawn must be mowed once a week. But the lawn is dormant during the fall and winter, and thus does not need to be on a maintenance schedule. Therefore, we set **First Mo. of Season** to March and the **Last Mo. of Season** to September.



If the Mow Lawn task is completed on September 24th, ordinarily the **Next Date Due** would be calculated for October 1st. Since this date is outside the specified season, FaciliWorks calculates the **Next Date Due** as March 1st of the next year.

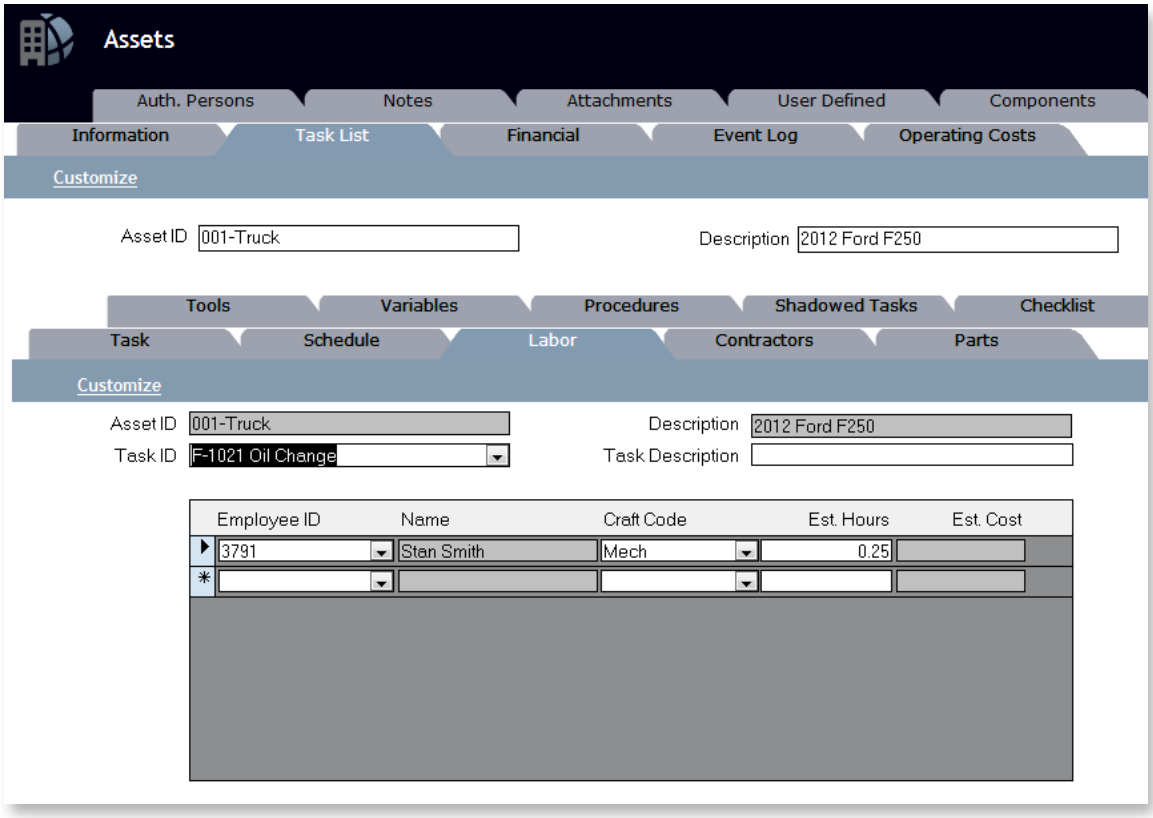
Fixed and Floating Schedules

Fixed or floating options can be set for either meter-based or date-based schedules. Use the **Fixed** option if you want the next maintenance due to always occur on a certain day or at a certain meter reading. For example, a task with a one-month frequency is due on the first day of each month, but it was neglected on December 1st (not completed until December 15th). A **Fixed** schedule will calculate the **Next Date Due** as January 1st. The maintenance is based on a strict fixed schedule, regardless of when the last maintenance occurred.

With the **Floating** option, although the **Next Date Due** is based on the unit set, the time of the last maintenance performed is used in the calculation. For example, if that same task with a one-month frequency unit is due on the first day of each month, and you last performed the maintenance on December 15th, a **Floating** schedule will calculate the **Next Date Due** as January 15th. The maintenance cycle has a more flexible schedule, based on one month following the date on which the last maintenance occurred.

Task List – Labor Sub-tab

In the **Asset ->Task List -> Labor** sub-tab, you can assign additional active employees to a task or delete employees that have already been assigned. To delete a labor record, place the cursor in the **Employee ID** field of the record to be deleted. On the ribbon, click **Records** and then click the drop-down menu on the **Delete** button. Select **Delete Record**.



The **Asset ID**, **Description**, **Task ID** and **Task Description** fields reflect the active asset and task records.

Employee ID: Use the drop-down list to select an employee.

Name: When you select the ID, the employee's name auto-fills this field from the **Staff Entry** record.

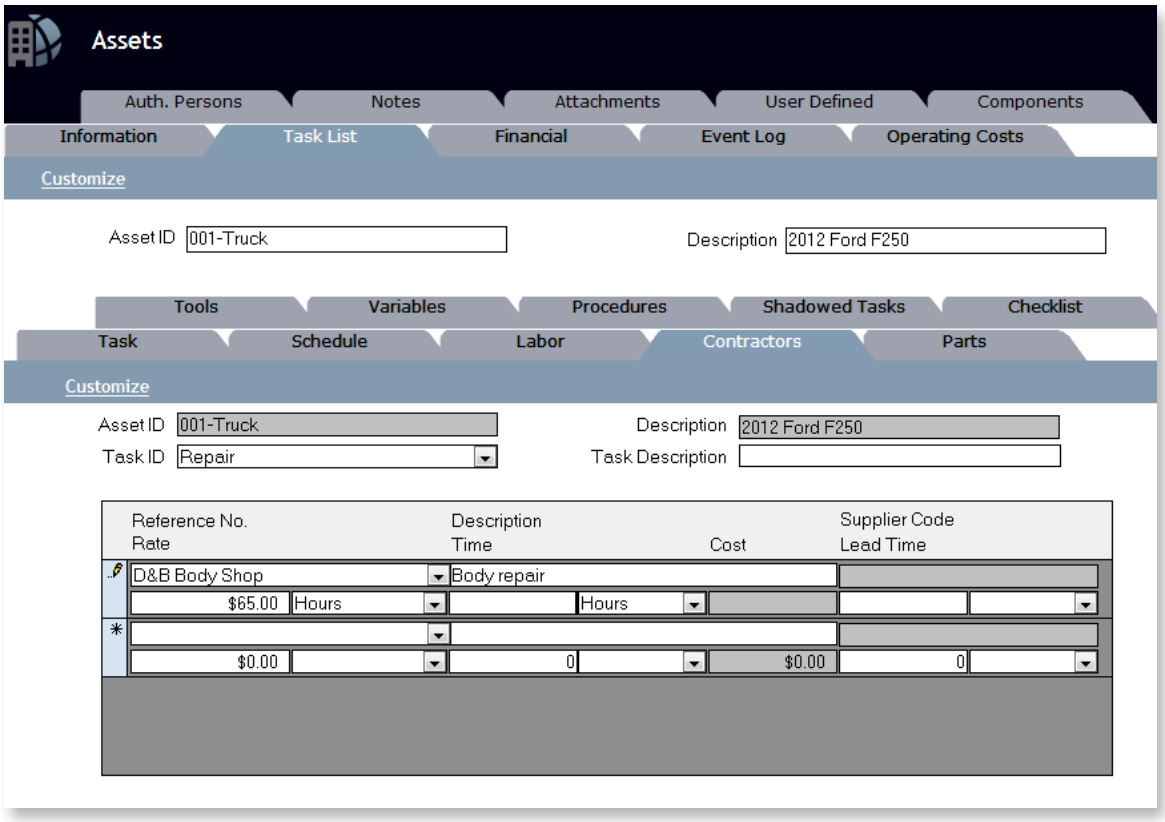
Craft Code: This field auto-fills from the **Staff Entry** record. If no value currently exists, type the employee's union affiliation, department or classification.

Est. Hours: Estimate the number hours needed for the employee to complete this task.

Est. Cost: FaciliWorks automatically calculates the estimated cost based on the number of hours multiplied by the employee's rate. This field cannot be edited.

Task List – Contractors Sub-tab

The **Contractors** sub-tab allows you to capture information for any outside contractors that are required to maintain the asset.



Enter a unique alphanumeric identification code for each contractor in the **Reference No.** field or select a contractor from the drop-down list. If you select an existing contractor from the drop-down list, the remaining fields will auto-fill with information from that original contractor record. If no such information was previously entered, you can enter that information here, based on the following field descriptions:

Rate: Enter the dollar amount the contractor charges in the left-hand field and the unit of time in the right-hand field, for example: $20.00/Hour, $500/Day or $.052/Mile.

Description: Enter a brief description of the service or asset that the contractor provides.

Time: Enter the estimated amount of time required to complete the work in the left-hand field and the unit of time in the right-hand field.

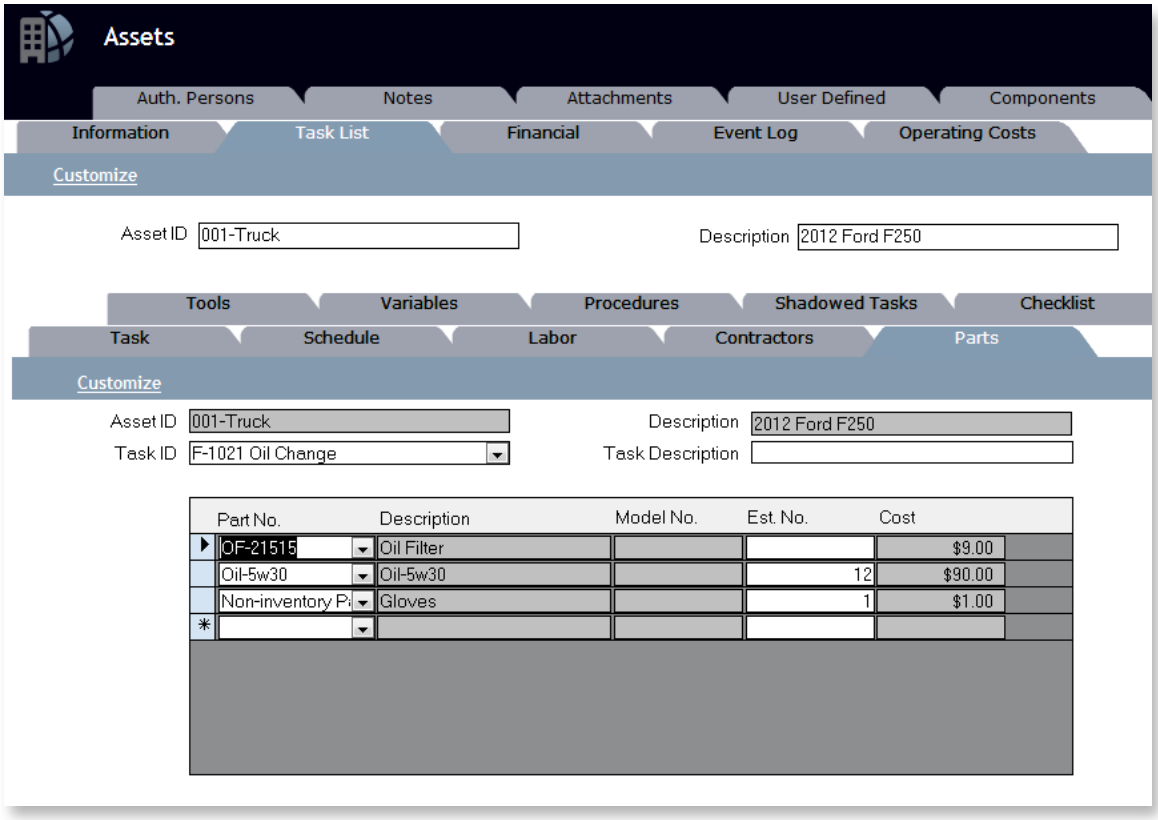
Cost: FaciliWorks automatically calculates and displays the estimated cost, based on the time required multiplied by the **Rate**.

Supplier Code: This field auto-fills with information entered within **Data Administration -> Suppliers** and is a non-editable field.

Lead Time: Enter the current lead time for the contractor or service, such as 3 Hours or 2 Days.

Task List – Parts Sub-tab

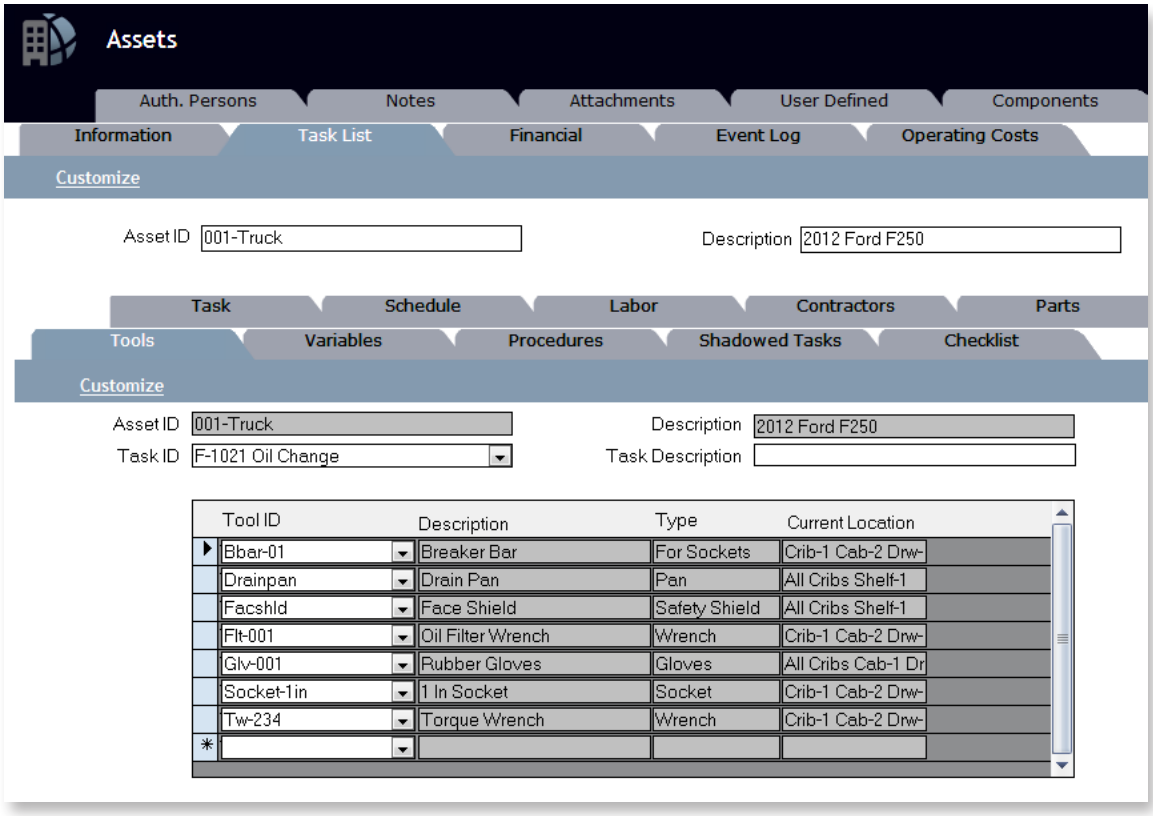
The **Parts** sub-tab captures information about any parts that may be required when the task is performed on the asset. Information for this form must be stored in the database before it can be assigned; see **Part Entry**.



Use the drop-down list in the **Part No.** field to select a part; the remaining fields will auto-fill. **Est. No.** of parts needed for this task is the only editable field; type in the numerical amount. FaciliWorks automatically calculates and displays the total cost in the **Cost** field based upon the estimated number of parts required multiplied by the unit cost of the part.

Task List – Tools Sub-tab

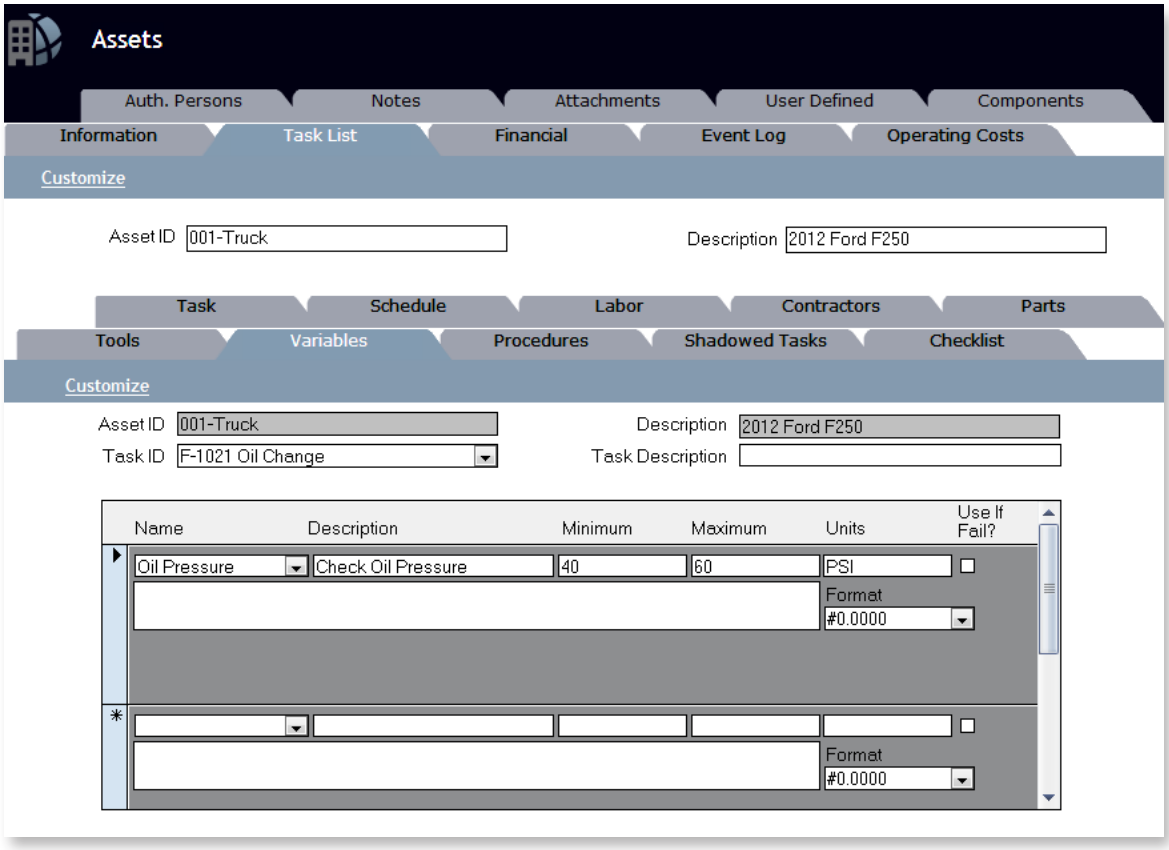
The **Tools** sub-tab captures information about any tools that may be required when the task is performed on the asset. Information for this form must be stored in the database before it can be assigned; see **Tool Entry**.



Use the drop-down list in the **Tool ID** field to select a tool; the remaining fields will auto-fill.

Task List – Variables Sub-tab

All information in the **Variables** sub-tab can be edited. If the name of the variable is selected from the drop-down list, the remaining fields will be auto-filled with information entered via **Data Administration -> Variable Data**.



To enter a new variable, type the unique identifier in the **Name** field. Use the tab key to navigate to the next field.

Name: The name of the variable that the technician will check.

Description: A brief description of the variable.

Minimum: The minimum test parameters for the variable. For example, if the variable is temperature, enter the lowest acceptable temperature for the task.

Maximum: The maximum test parameter for the variable.

Units: The units being measured. This includes, but is not limited to, degrees, inches, foot-pounds, rpm, amps, quarts, psi or any other unit by which job conditions are measured.

Use if Fail?: Check this box if the asset can be used and the task can be completed even if the conditions specified for the variable are not met.

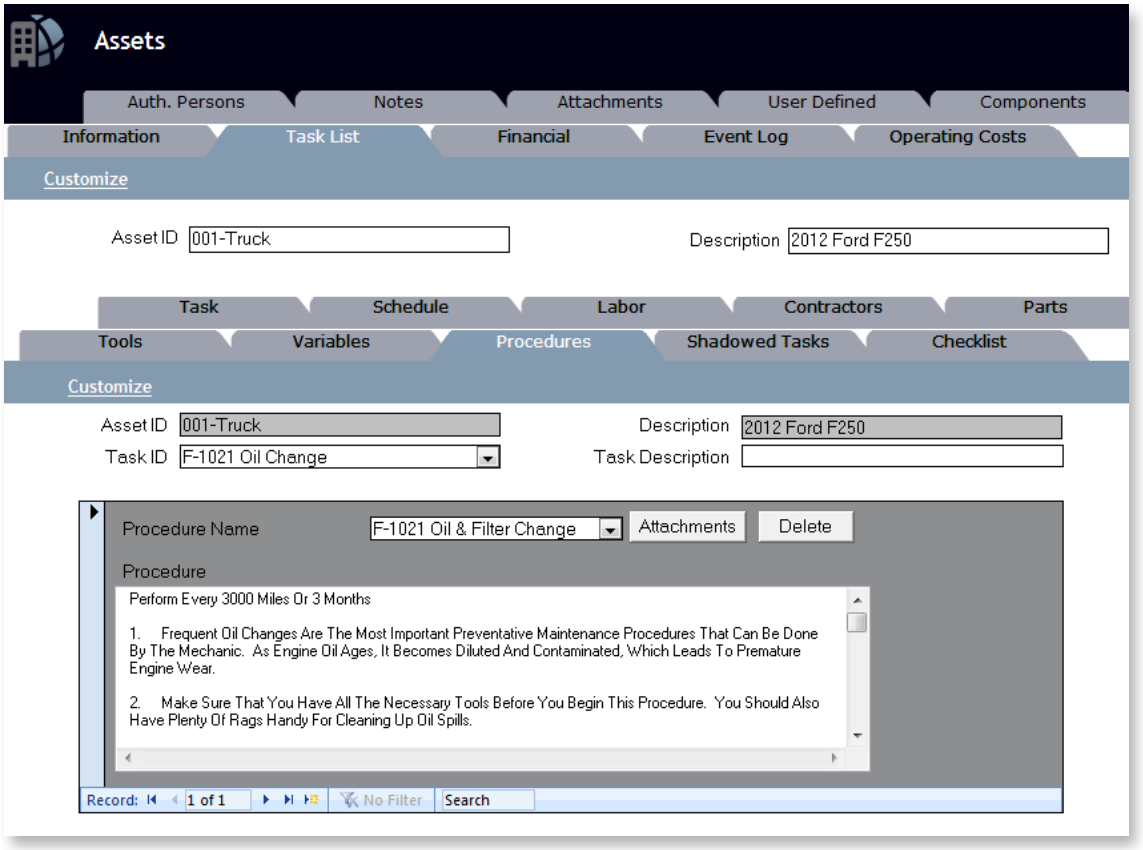
Comments: Any other pertinent information, such as instructions for testing the variable.

Format: Select the number of decimal places for the minimum and maximum values.

Task List – Procedures Sub-tab

In the **Procedures** sub-tab, one or more previously entered procedures that apply to the task can be selected. The arrows on the **Record Navigation Bar** are used to view additional procedures. To select an additional procedure, click the **New Blank Record** button on the **Record Navigation Bar**. A blank form will appear, ready for you to select another procedure name from the list of procedures. If you have a file attached to a procedure, click the **Attachments** button to view the attachment list and then click the **View/Print** button to display the attachment. Use the browse button **[...]** on the right of the **File** field to select a file using Windows' built-in file locator dialogue box.

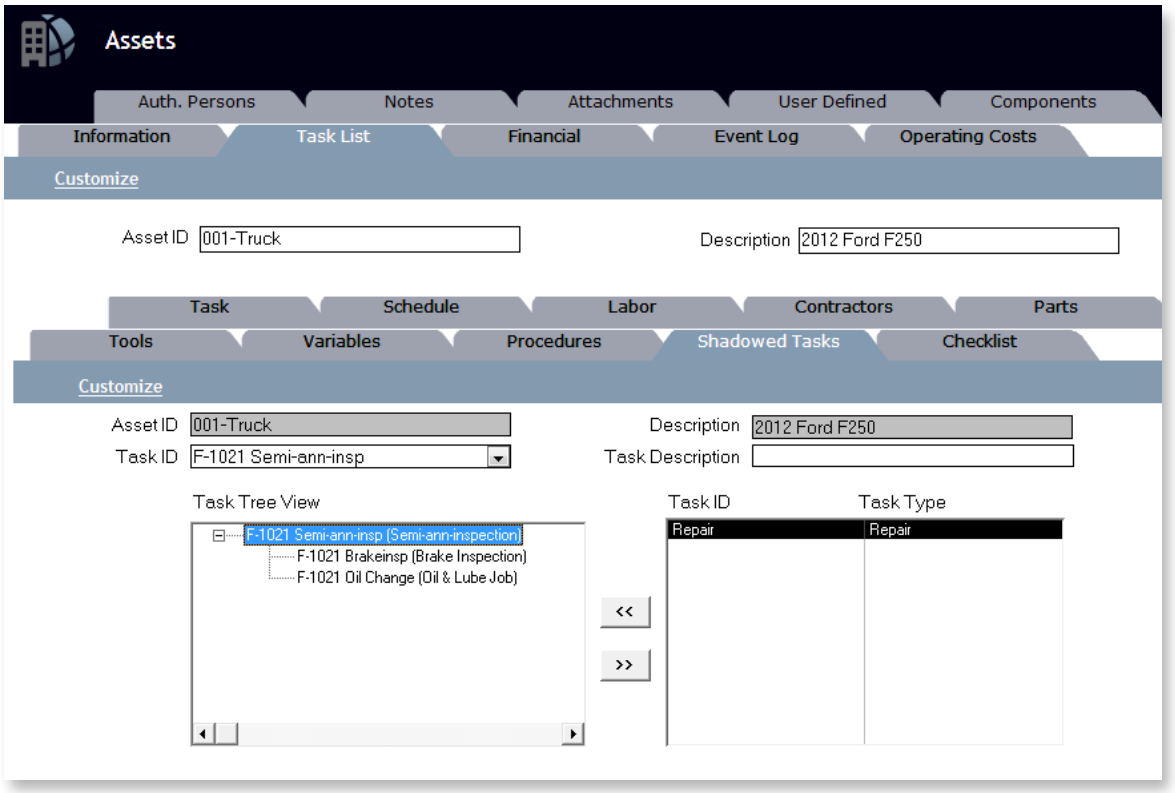
For more details about entering procedure records, please see the **Procedure Entry** in **Chapter Five**.



Task List – Shadowed Tasks Sub-tab

When task shadowing is employed, the completion of the shadowing task automatically completes the shadowed tasks. The shadowing task includes all the work of the shadowed task. In the example below, the 001-Truck asset has two separate tasks attached to it: a semi-annual inspection and an oil change.

The semi-annual inspection includes an oil change as part of the inspection, so the semi-annual inspection is the shadowing task and the oil change is the shadowed task. When the shadowing task is completed, it automatically updates the date done, meter done, date due and meter due of the shadowed task. If the regular oil change fell on the same date as the semi-annual inspection, there is no need to perform both tasks, as the semi-annual inspection includes an oil change. Identifying shadowed tasks allows FaciliWorks to confirm each task as complete even though only the shadowing task was performed. This saves time in creating work orders, as only one is needed.



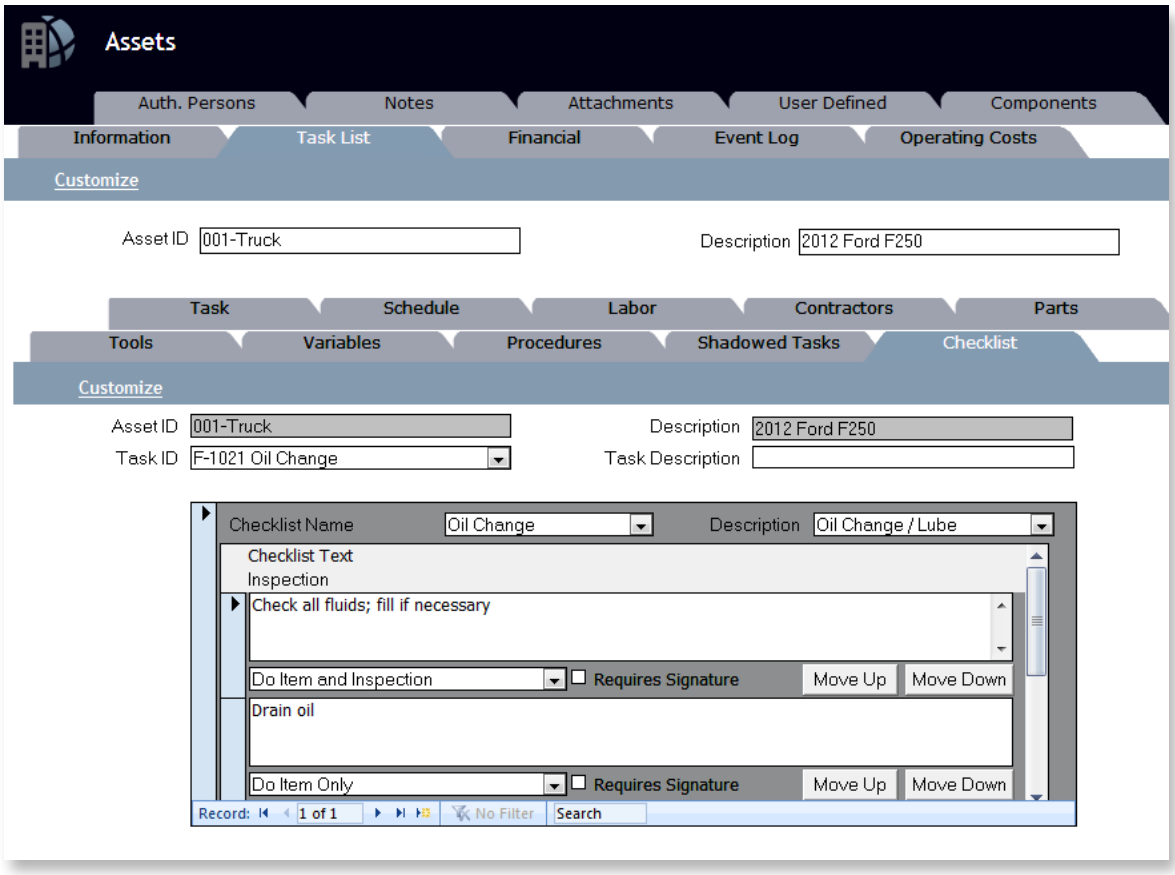
Shadowing can only be applied to the same asset. Therefore, a task for Asset-001 cannot shadow or be shadowed by tasks for Asset-002.

A complete list of **Task IDs** and **Task Types** for the asset will be displayed in the box on the right. First, select the shadowing task and add it to the **Task Tree View** box on the left by clicking the **<<** button. Shadowed tasks are then selected and added to the tree view in the same manner.

Task List – Checklist Sub-tab

A **Checklist** is a user-defined set of steps that must be verified prior to completing a task. You must enter records for checklists within **Data Administration -> Checklists** before you can assign them to asset-task records. For more information, see **Checklist Entry** in **Chapter Five**.

A checklist assigned to a particular task can be edited here; however, changes made at this time will not affect the checklist anywhere else it appears. If you want to globally change a checklist, you must do so within **Data Administration -> Checklists**.



Checklist Name: Select a checklist from the drop-down list.

Description: The description of the selected checklist will populate this field.

Checklist Text: This field auto-fills with information from the checklist record or you can enter new text.

Inspection: This field auto-fills with information from the checklist record or you can select **Do Item Only**, **Inspection Only** or **Do Item and Inspection** from the drop-down list.

Requires Signature: This field auto-fills with information from the checklist record or you can check this box to require an electronic signature on this checklist item before a work order containing this checklist can be completed.

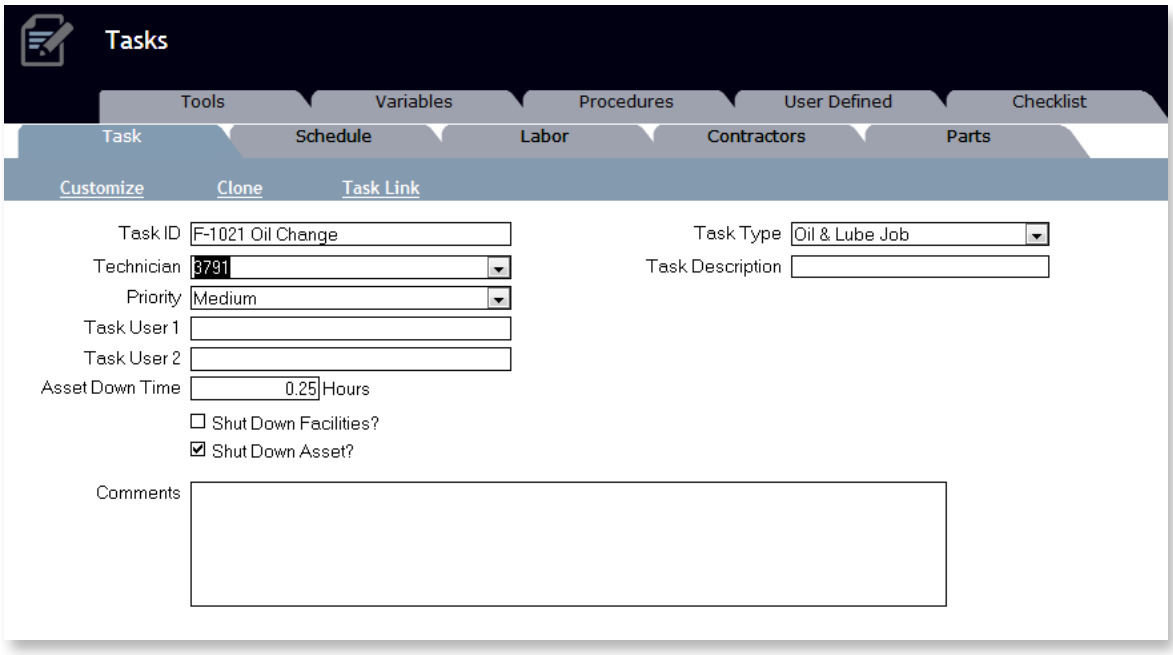
Move Up and Move Down: Click these buttons to move the checklist item up or down as required.

Task Entry

From the Main Menu, navigate to **Data Administration -> Tasks**.

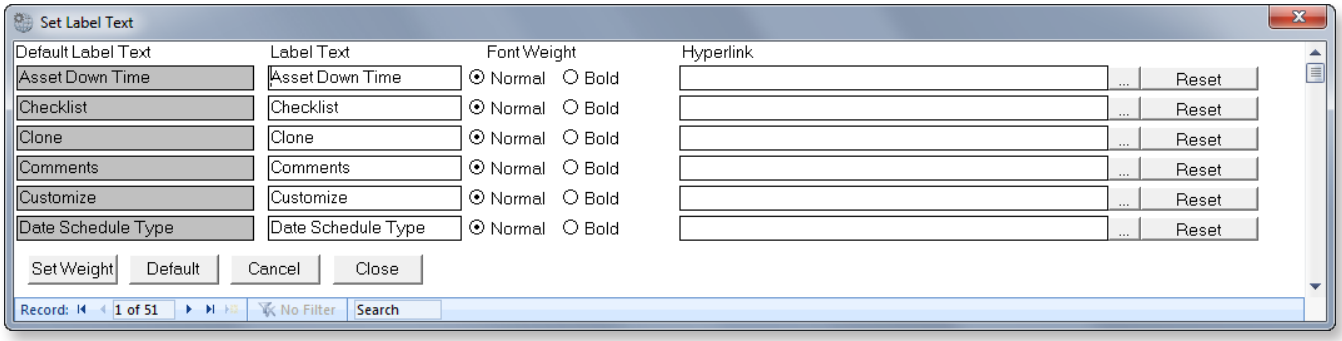
Tasks – Task Tab

The **Task** tab allows you to specify information about the work (preventative maintenance) that will be performed on an asset. Before attaching your tasks to your assets as described earlier in this chapter, it is wise to create and modify tasks here in **Data Administration -> Tasks**. Any task that you create here will be available for all assets. It is highly recommend that tasks are always entered here so that tasks can be tracked independently of assets. Once a task is attached to an asset, it can be modified to reflect all requirements exclusively for that asset.



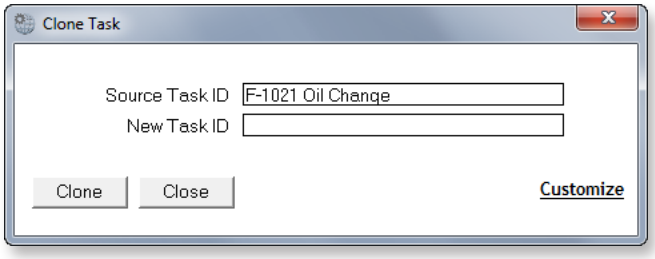
Customize Button

The **Customize** button allows you to modify the form labels and font weight of the labels. The **Set Weight** button will set all fonts to bold. Return all labels to the original settings clicking the **Default** button. The **Cancel** button will close the window with no further action, while the **Close** button saves any modifications before closing the window.

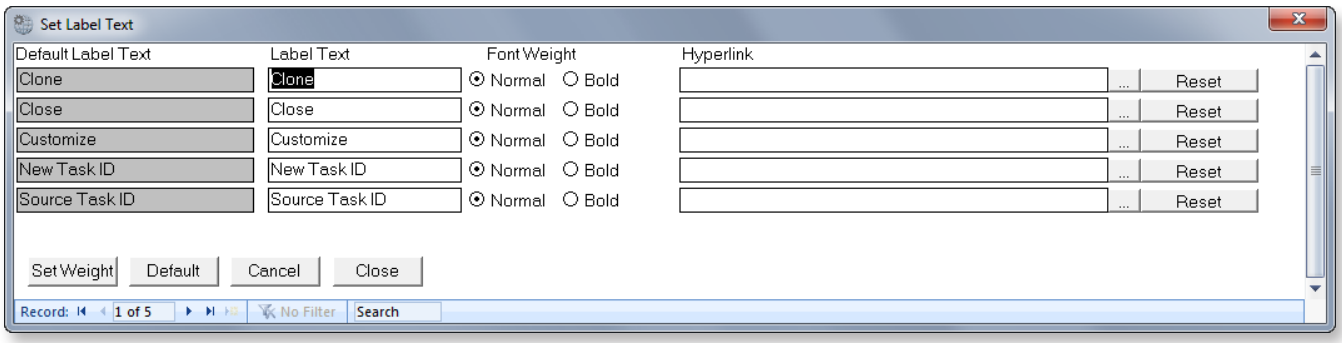


Clone Button

Within the **Task** tab, click the **Clone** button to create a new task record based on the current record. In the **Clone Task** window, type a **New Task ID**, then click **Clone** to create the task. When the task is successfully cloned, all task components are copied to the new task. Click **OK** on the acknowledgement window and then click **Close** on the **Clone Task** window or enter another **New Task ID** to create a second clone. Click **Close** to exit this window without cloning the task record.

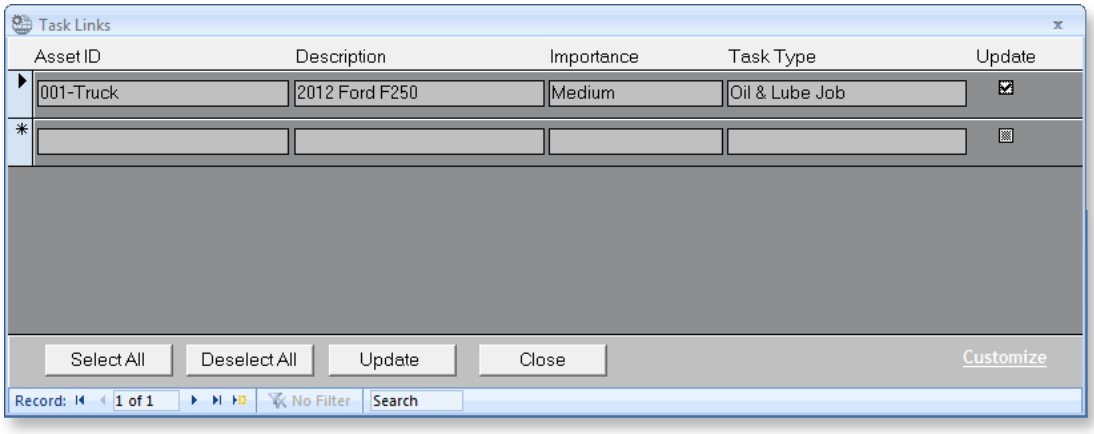


When you click **Customize** in the **Clone Task** window, the window below opens which allows you to modify the labels in the **Clone Task** window:



Task Link Button

If you modify a task record, you can automatically update associated asset records by clicking the **Task Link** button. The **Task Links** window displays a list of all assets that use this task.



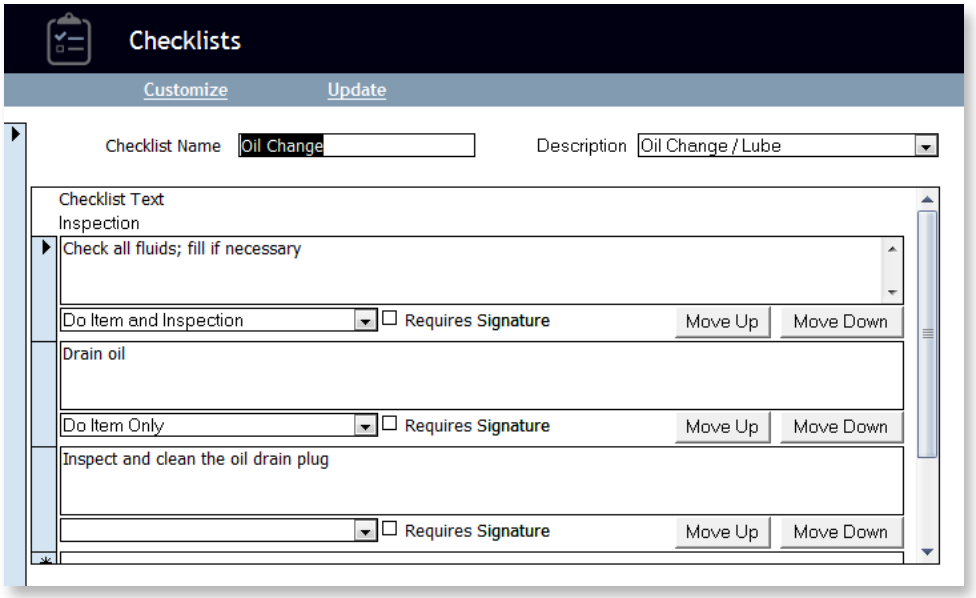
Check the **Update** checkbox for each asset record that you want to update (click **Select All** to update all records). Next, click the **Update** button at the bottom of the window. FaciliWorks will automatically update the selected asset records with the revised task information.

Tasks – Task Component Tabs

The forms to capture task data are similar to the forms to enter task information on the **Task List** tab within **Assets**. Each task consists of several components, all of which are previously entered into the database to take advantage of the drop-down lists. These components include Schedule, Labor, Contract, Parts, Tools, Variables, Procedures, User Defined and Checklist. Each tab is explained in the **Assets -> Task List** section earlier in this chapter.

Checklist Entry

A **Checklist** is a user-defined set of steps that must be verified prior to completing a task. Each step must be checked before a task is completed. To create and edit checklists, navigate to **Data Administration -> Checklists**.



To create a new checklist, click the **New Blank Record** button on the **Record Navigation Bar**.

Checklist Name: Enter a unique name for the checklist.

Description: Enter a description of the checklist or choose an existing description from the drop-down list.

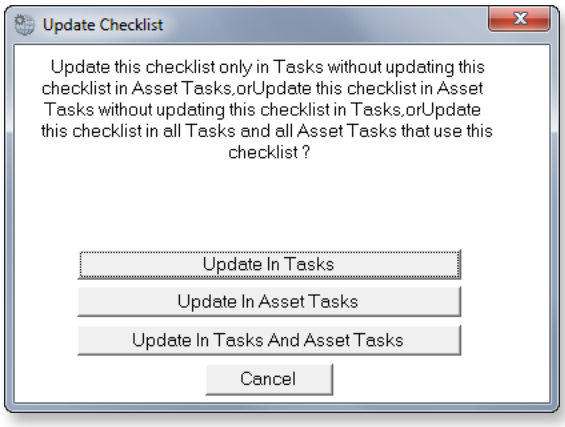
Checklist Text: Enter text for the checklist item; as you do, a blank record for a second checklist item will appear below it.

Inspection: Choose **Do Item Only**, **Inspection Only** or **Do Item and Inspection** from the drop-down list.

Requires Signature: Check this box to require an electronic signature on this checklist item before a work order containing this checklist can be completed.

Move Up and **Move Down**: Click on these buttons to move the checklist item up or down in the checklist as required.

Update: Click this button to update the checklist. A dialog box will appear:


Update Checklist
Update this checklist only in Tasks without updating this checklist in Asset Tasks,orUpdate this checklist in Asset Tasks without updating this checklist in Tasks,orUpdate this checklist in all Tasks and all Asset Tasks that use this checklist ?
Update In Tasks
Update In Asset Tasks
Update In Tasks And Asset Tasks
Cancel

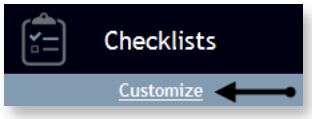
- Click **Update in Tasks** to update the checklist in **Tasks** but not in **Asset Tasks**.
- Click **Update in Asset Tasks** to update the checklist in **Asset Tasks** but not in **Tasks**. An **Asset Task** is a task record within an asset record; this task record may have been modified to be specific to the asset.
- Click **Update in Tasks and Asset Tasks** to update the checklist in both sets of records.

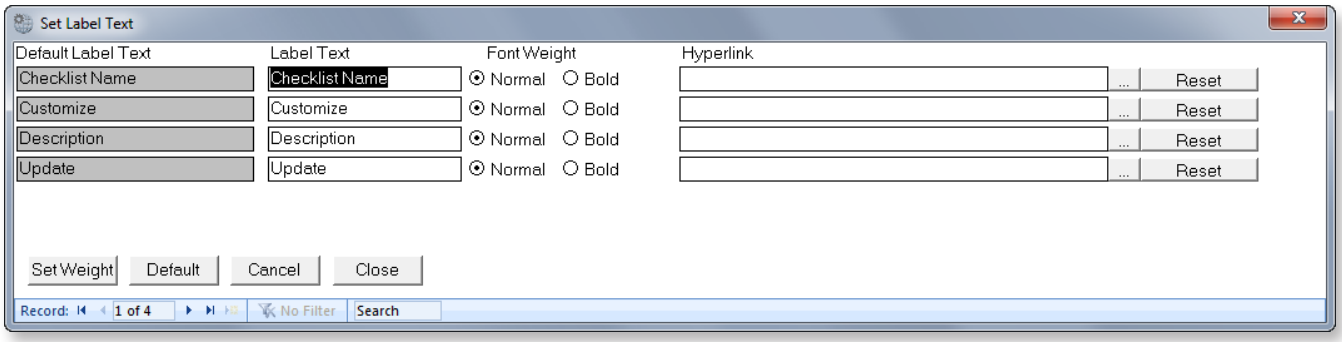
Click **Cancel** to return to the **Checklist** form without updating.

Customize Buttons

There are two **Customize** buttons on the **Checklists** form. Both will allow you to modify the form labels and font weight of the labels. The **Set Weight** button will set all fonts to bold. Return all labels to the original settings using the **Default** button. The **Cancel** button will close the window with no further action, while the **Close** button saves any modifications before closing the window.

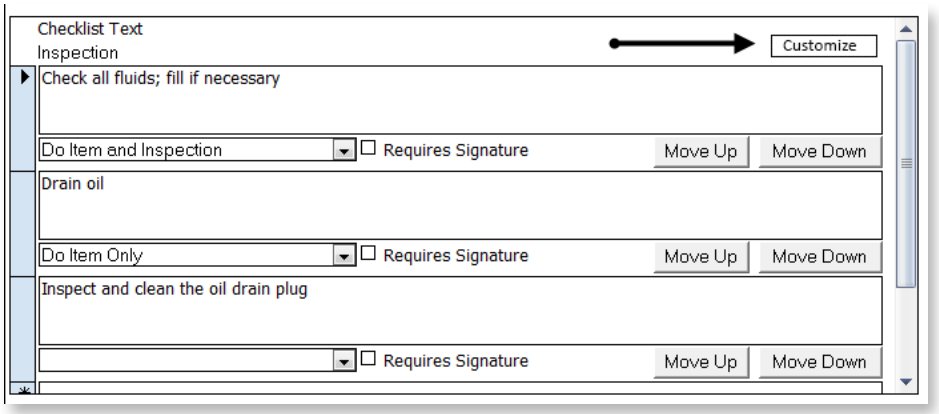
Click the **Customize** button directly below the **Checklist** form title to modify the **Checklist Name** and **Description** field labels or the **Update** button label.

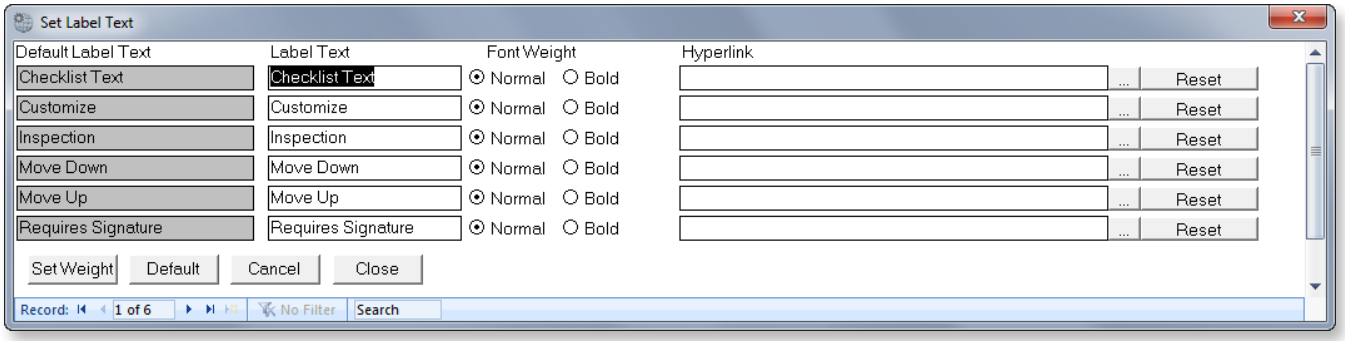




Modify the value in the **Label Text** column to change the labels. Any of the labels can be a hyperlink to a file. Type in the file path or click the browse button **[...]** to navigate to the file.

Click the **Customize** button in the **Checklist Text** pane to modify the labels that appear in that pane:

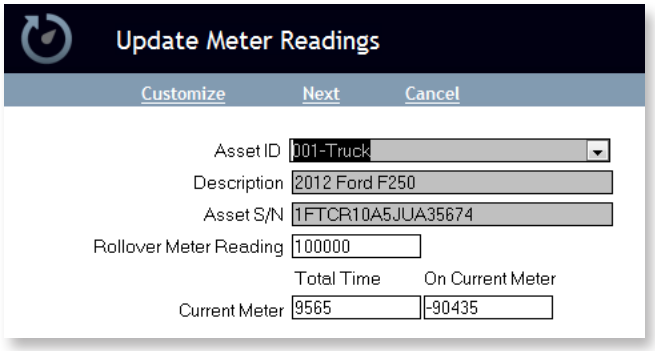




Update Meter Readings

Navigate to **Data Administration -> Update Meter Readings**. Assets that are on a meter-based schedule will need to be updated periodically with the current meter reading. As the meter is updated, FaciliWorks will automatically update the **Usage Left** meter (located in **Work Orders -> Manual Create Scheduled Work Orders**). When the **Usage Left** meter falls to zero (or below), it is time to perform the scheduled maintenance on the asset.

Use the **Asset ID** drop-down list to select an asset. All fields will be auto-filled with the current data for the asset. Type the current meter reading in the **Total Time** column and then click **Next**. The update has been performed and the fields are blank now, allowing you to update the readings for another asset.

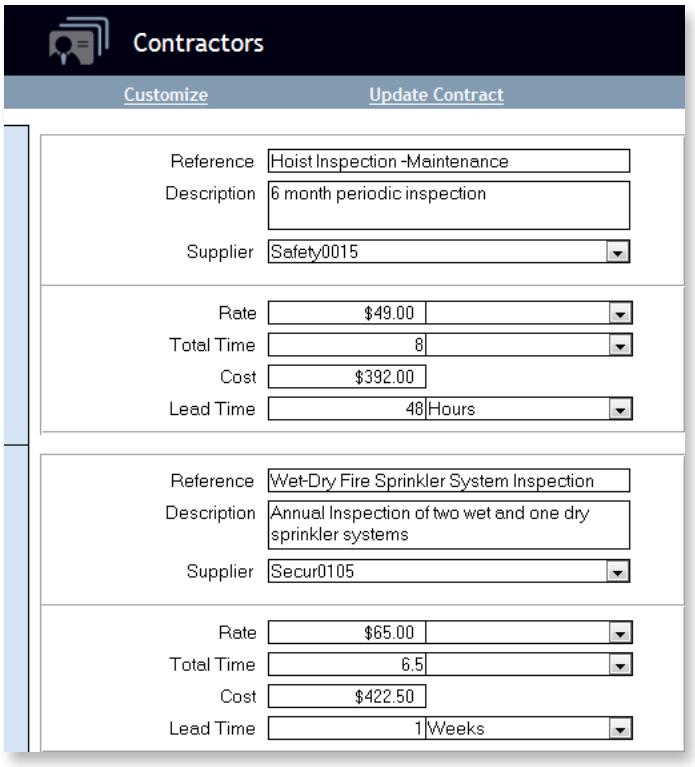


Click **Customize** to modify the form labels and font weight of the labels. The **Set Weight** button will set all fonts to bold. Return all labels to the original settings using the **Default** button. The **Cancel** button will close the window with no further action, while the **Close** button saves any modifications before closing the window.

Clicking **Cancel** will close the form and return you to the **Data Administration** menu.

Contractor Entry

Navigate to **Data Administration -> Contractors** to enter information about outside services or consultants.



Reference: Enter a unique reference ID for each contract.

Description: Enter a description of the services or equipment provided by the contract.

Supplier: Enter the name of the supplier of the contracted goods/services or select a supplier from the drop-down list.

Rate: Enter the contract rate in these fields; for example, $75/Day.

Total Time: The length of time the goods or services will be needed.

Cost: FaciliWorks calculates the total cost of the contract by multiplying the **Rate** by the **Total Time**.

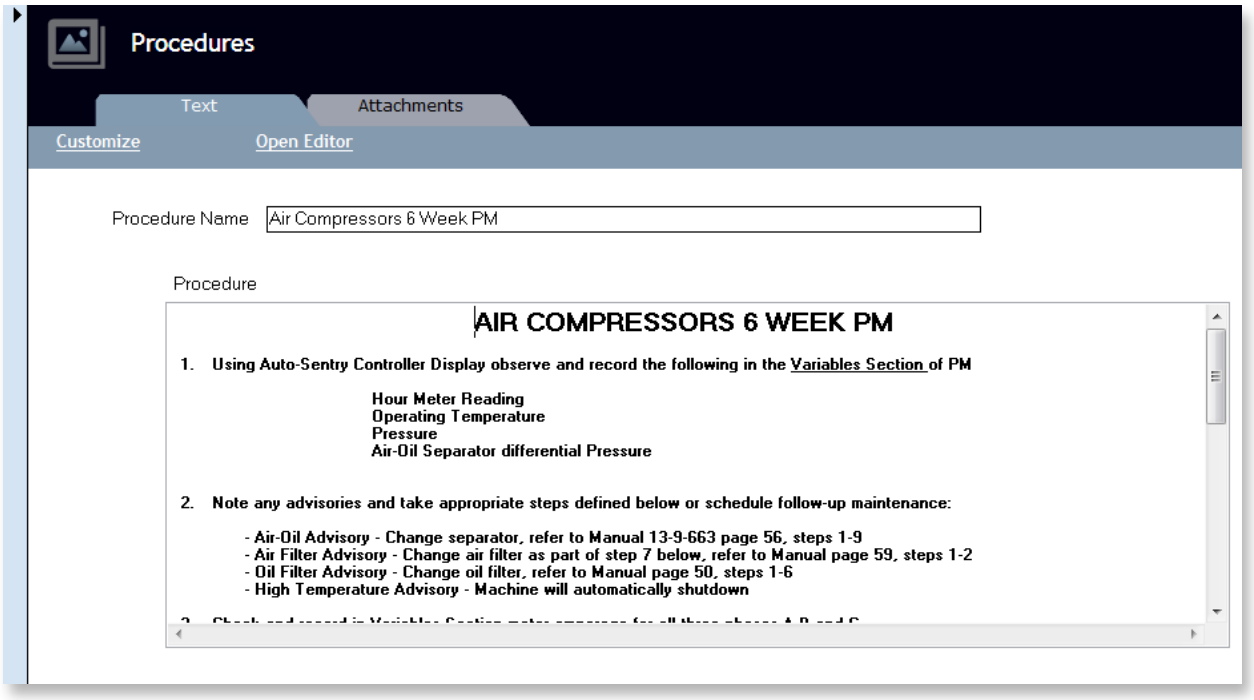
Lead Time: If the supplier needs a specific amount of notice for providing the service, enter that notice time in this field.

Update Contract button: If you change the record, click this button. You can update associated task or asset records.

Procedure Entry

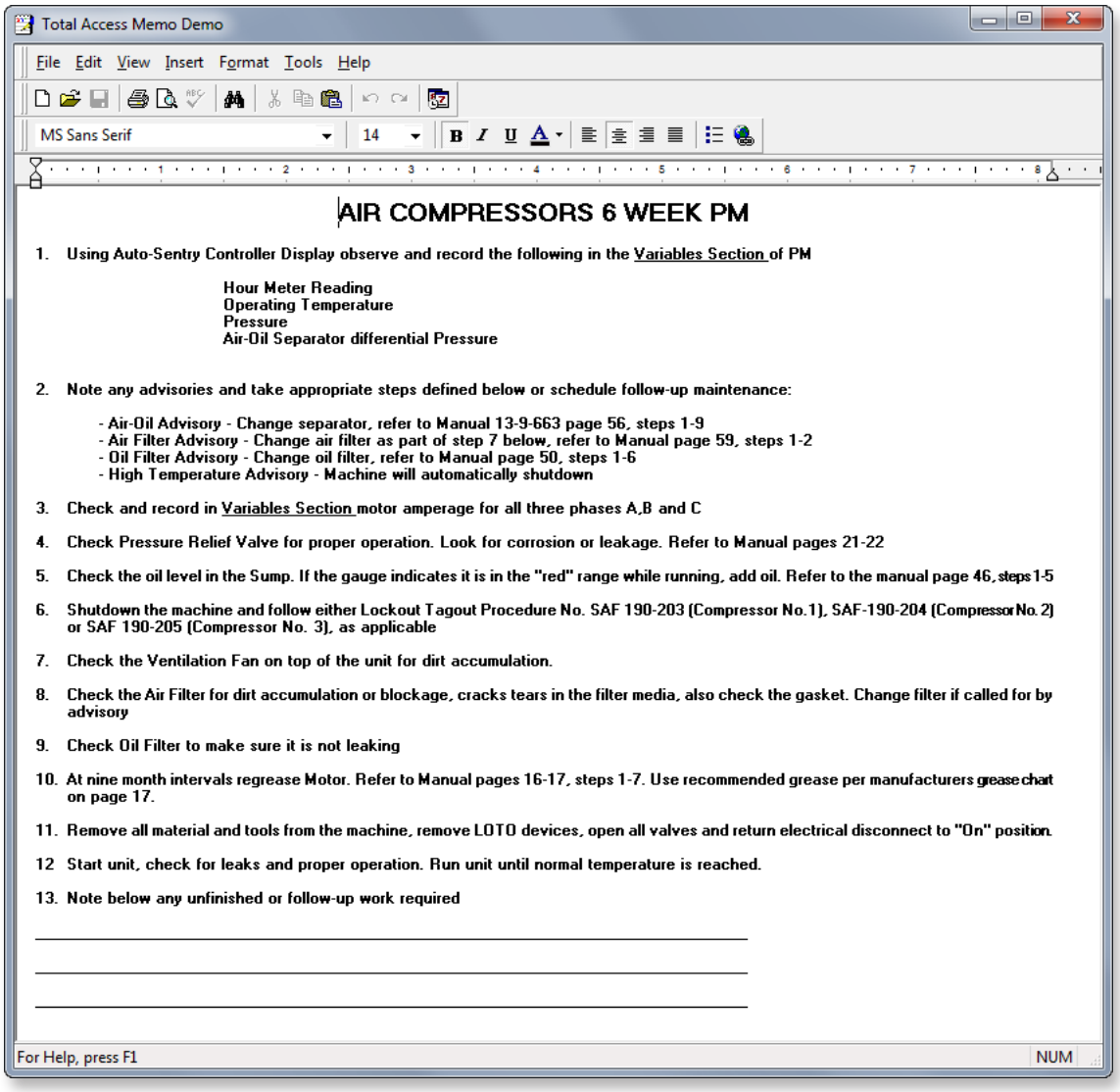
Navigate to **Data Administration -> Procedures** to create procedures to associate with your asset, task and work order records. You can also attach pictures, maps, multi-media files or any other document or file with your procedures.

Procedures – Text Tab


Procedures
Text
Attachments
Customize
Open Editor
Procedure Name
Air Compressors 6 Week PM
Procedure
AIR COMPRESSORS 6 WEEK PM
1. Using Auto-Sentry Controller Display observe and record the following in the Variables Section of PM
Hour Meter Reading
Operating Temperature
Pressure
Air-Oil Separator differential Pressure
2. Note any advisories and take appropriate steps defined below or schedule follow-up maintenance:
- Air-Oil Advisory - Change separator, refer to Manual 13-9-663 page 56, steps 1-9
- Air Filter Advisory - Change air filter as part of step 7 below, refer to Manual page 59, steps 1-2
- Oil Filter Advisory - Change oil filter, refer to Manual page 50, steps 1-6
- High Temperature Advisory - Machine will automatically shutdown

Use the **Record Navigation Bar** at the lower left corner of the **Text** tab to navigate through the stored procedures. To enter a new procedure, click the **New Blank Record** button.

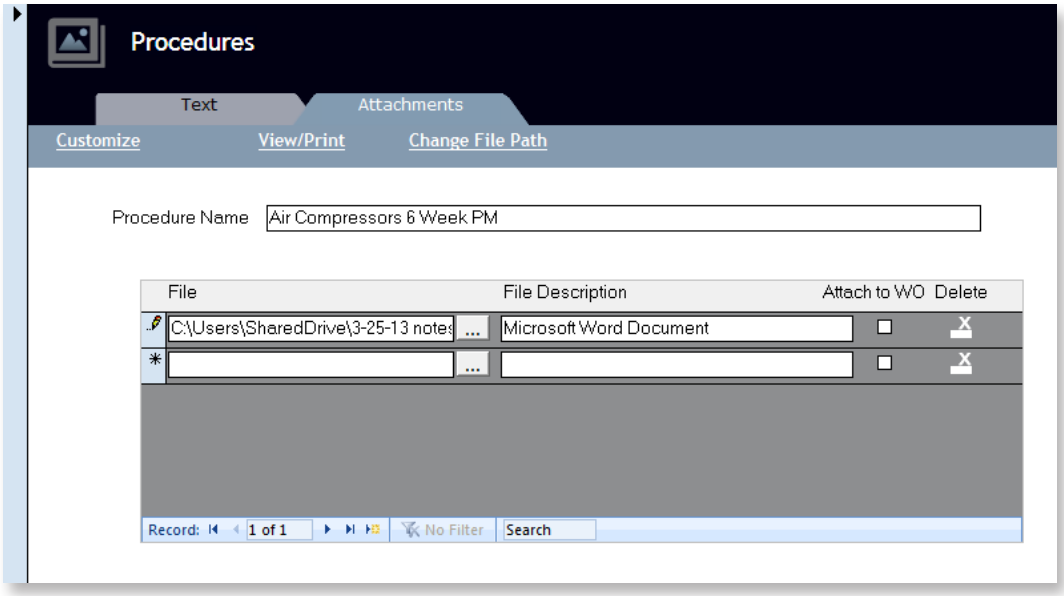
Each procedure must have a unique **Procedure Name**. Next, enter the procedure text. You can either type the text directly into the **Procedure** field or copy/paste text from an existing file. If you need more formatting options, including paragraph indent, bullet points, font formatting, etc., click the **Open Editor** button to open an external text editor to format your procedure information.


Total Access Memo Demo
File Edit View Insert Format Tools Help
MS Sans Serif
14
AIR COMPRESSORS 6 WEEK PM
1. Using Auto-Sentry Controller Display observe and record the following in the Variables Section of PM
Hour Meter Reading
Operating Temperature
Pressure
Air-Oil Separator differential Pressure
2. Note any advisories and take appropriate steps defined below or schedule follow-up maintenance:
- Air-Oil Advisory - Change separator, refer to Manual 13-9-663 page 56, steps 1-9
- Air Filter Advisory - Change air filter as part of step 7 below, refer to Manual page 59, steps 1-2
- Oil Filter Advisory - Change oil filter, refer to Manual page 50, steps 1-6
- High Temperature Advisory - Machine will automatically shutdown
3. Check and record in Variables Section motor amperage for all three phases A,B and C
4. Check Pressure Relief Valve for proper operation. Look for corrosion or leakage. Refer to Manual pages 21-22
5. Check the oil level in the Sump. If the gauge indicates it is in the "red" range while running, add oil. Refer to the manual page 46, steps 1-5
6. Shutdown the machine and follow either Lockout Tagout Procedure No. SAF 190-203 (Compressor No.1), SAF-190-204 (Compressor No. 2) or SAF 190-205 (Compressor No. 3), as applicable
7. Check the Ventilation Fan on top of the unit for dirt accumulation.
8. Check the Air Filter for dirt accumulation or blockage, cracks tears in the filter media, also check the gasket. Change filter if called for by advisory
9. Check Oil Filter to make sure it is not leaking
10. At nine month intervals regrease Motor. Refer to Manual pages 16-17, steps 1-7. Use recommended grease per manufacturers grease chart on page 17.
11. Remove all material and tools from the machine, remove LOTO devices, open all valves and return electrical disconnect to "On" position.
12 Start unit, check for leaks and proper operation. Run unit until normal temperature is reached.
13. Note below any unfinished or follow-up work required
For Help, press F1
NUM

Note: Changes made to an existing procedure don't affect all tasks that use it unless or until you update the task(s).

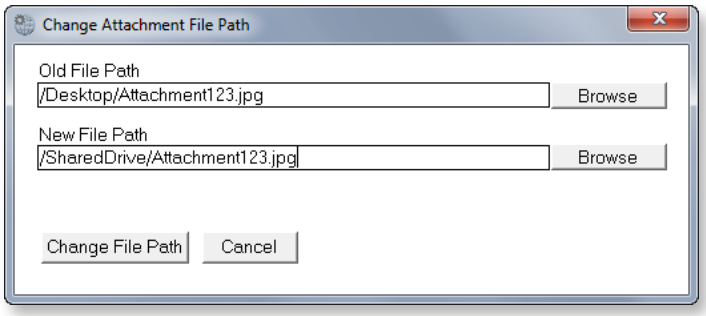
Procedures – Attachments Tab

You can attach pictures, maps, other drawing objects or any other file to a procedure in the **Attachments** tab.



To attach a file to a procedure, type the file path and name into the **File** field or click the **[...]** button to browse for the file. The **File Description** will be auto-filled with the type of file attached, such as MS Word, MS Excel, images, PDF or Text formats, but this content can be overwritten by deleting it and typing in a new description.

If the file path of an attachment has changed, click **Change File Path** and the following window will open:



Enter the appropriate information and then click the **Change File Path** button.

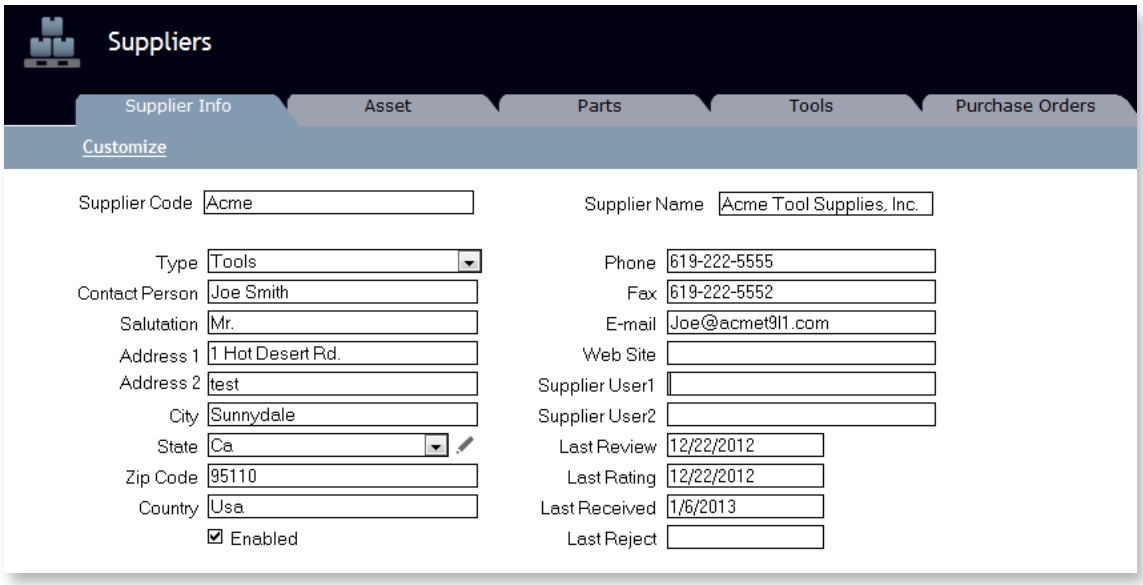
There is no limit to the number of files you can attach. To view or print attached files, click the **View/Print** button. Click the **Attach to WO** checkbox to allow your attachments to be printed on your work orders.

Supplier Entry

Before you add data to assets, parts, tools or contractors, all vendor/supplier data is entered in **Data Administration -> Suppliers**. All assets, parts, tools and purchase orders for the supplier are tracked here.

Suppliers – Supplier Info Tab

The **Supplier Info** tab contains general information about the supplier. Each supplier must have a unique identifier. If the supplier is currently in good standing, the **Enabled** box will be checked and the supplier will be displayed in the drop-down lists of all other forms using this information (assets, parts, tools and contractors).



Supplier Code: Enter a unique alphanumeric identification code for each supplier.

Supplier Name: The supplier company name.

Type: Select the supplier type from the drop-down list or enter a new type to add to the list.

Contact Person: The name of the person to contact.

Salutation: Mr., Ms. or Mrs., etc. If you leave this field blank, FaciliWorks will direct your correspondence simply to the name of the contact person (for example, Joe Smith instead of Mr. Joe Smith).

Address, **City**, **State**, **Zip** and **Country**: Enter the supplier's address in the appropriate fields. Note: To modify or add to the **States** drop-down list, click the unmarked button to the right of the drop-down list button; the **States Entry** form will appear allowing you to enter new state codes.

Phone and **Fax**: The supplier's telephone and fax numbers.

Email and **Web Site**: The supplier's email address and web site.

Enabled: Check this box to indicate that this supplier is currently active. Only enabled suppliers appear **Supplier** drop-down lists elsewhere in the program.

Supplier User 1 and **Supplier User 2**: Use these fields to store any additional information about each supplier that you consider useful.

Last Review: The date of the last review of this supplier.

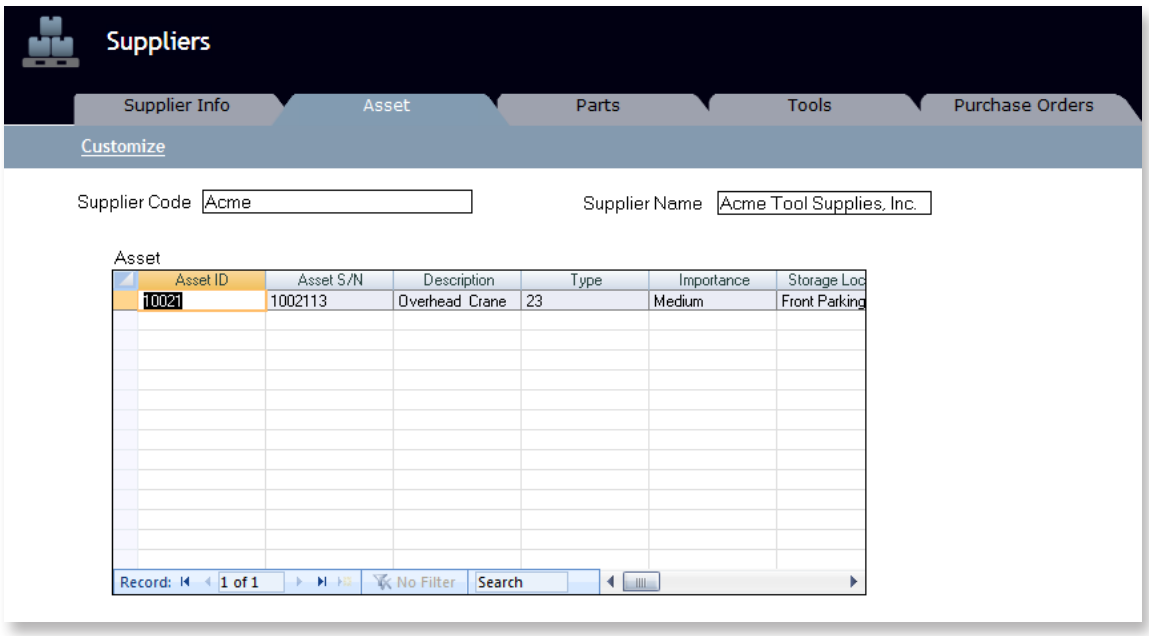
Last Rating: The date of the last rating of this supplier.

Last Received: The date of the last shipment you received from this supplier.

Last Reject: The date of the last time you rejected parts from this supplier.

Suppliers – Asset Tab

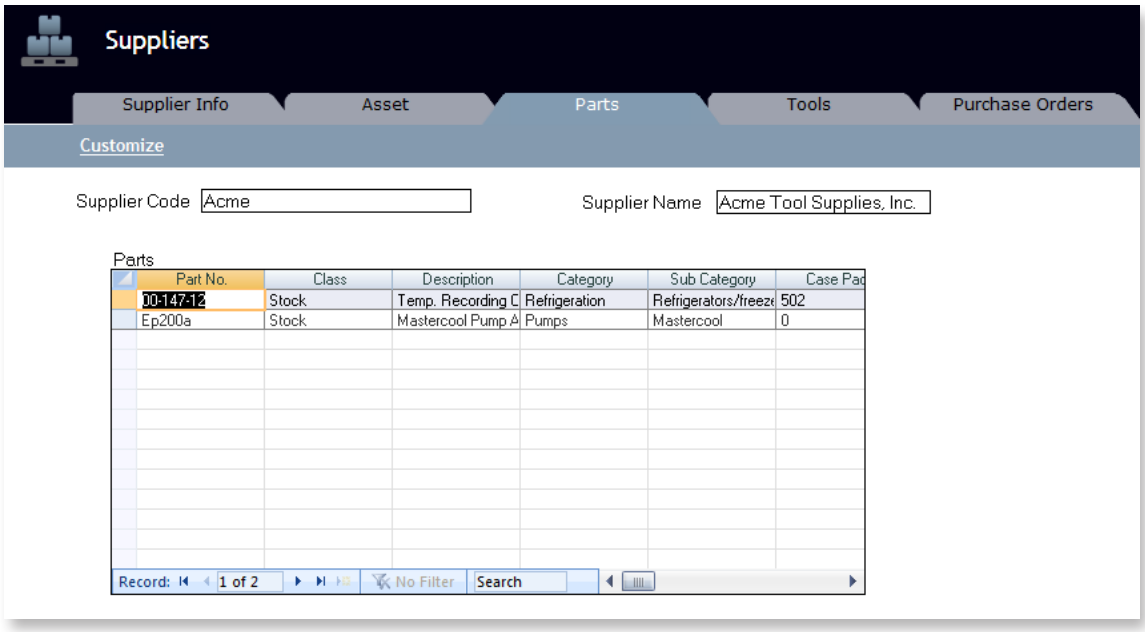
On the **Asset** tab, FaciliWorks automatically tracks and displays all of the assets that are supplied by this supplier.



You cannot enter or edit information here. If you need to edit this information, close **Suppliers** to return to the **Data Administration** menu and then click **Assets**. As you make the required changes to the asset, the **Suppliers -> Asset** tab information is updated.

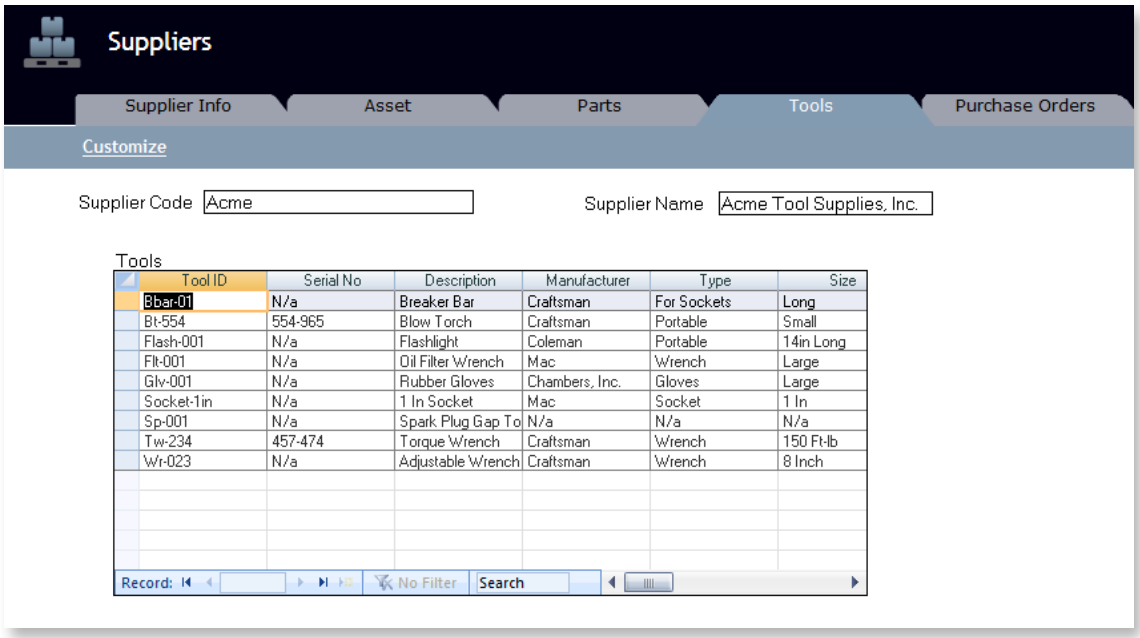
Suppliers – Parts Tab

The **Parts** tab automatically displays all records for parts that are purchased from this supplier. If this information is incorrect or incomplete, close **Suppliers** to return to the Main Menu. Navigate to **Spare Parts Inventory -> Part Entry**. As you make the required changes to the part, the **Suppliers -> Parts** tab information is updated.



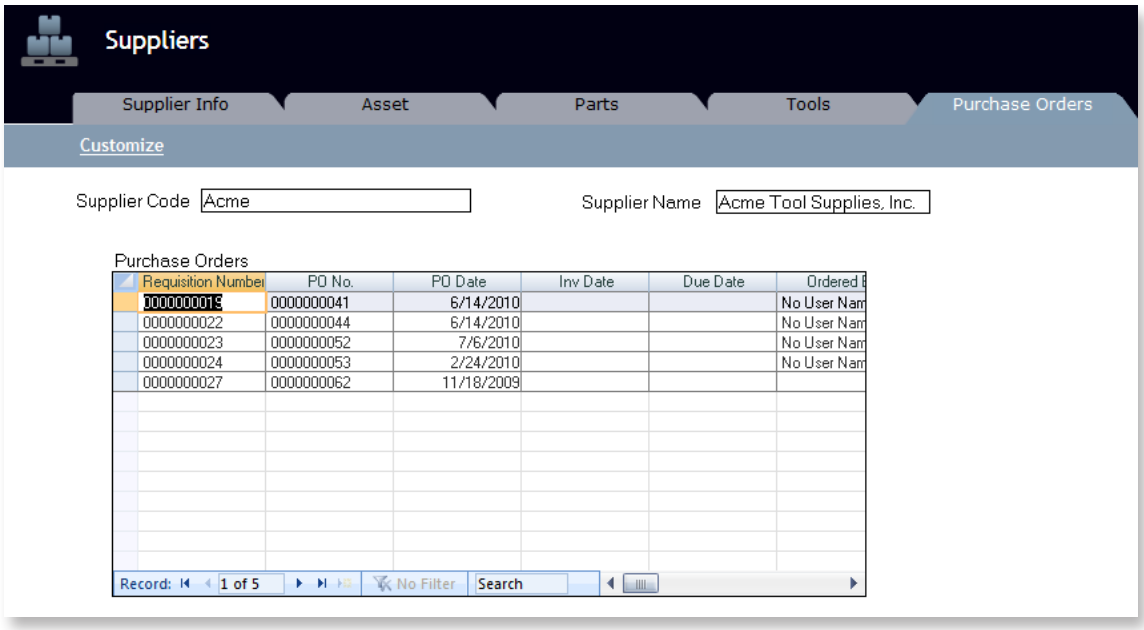
Suppliers – Tools Tab

The **Tools** tab displays all tool records associated with this supplier. As in the **Assets** and **Parts** forms, you cannot change this information here. To modify records, close **Suppliers** to return to the Main Menu and then navigate to **Tools -> Tool Entry**. As you make the required changes to the part, the **Suppliers -> Tools** tab information is updated.


Suppliers
Supplier Info
Asset
Parts
Tools
Purchase Orders
Customize
Supplier Code Acme
Supplier Name Acme Tool Supplies, Inc.
Tools
Tool ID | Serial No | Description | Manufacturer | Type | Size
Bbar-01 | N/a | Breaker Bar | Craftsman | For Sockets | Long
Bt-554 | 554-965 | Blow Torch | Craftsman | Portable | Small
Flash-001 | N/a | Flashlight | Coleman | Portable | 14in Long
Flt-001 | N/a | Oil Filter Wrench | Mac | Wrench | Large
Glv-001 | N/a | Rubber Gloves | Chambers, Inc. | Gloves | Large
Socket-1in | N/a | 1 In Socket | Mac | Socket | 1 In
Sp-001 | N/a | Spark Plug Gap To | N/a | N/a | N/a
Tw-234 | 457-474 | Torque Wrench | Craftsman | Wrench | 150 Ft-lb
Wr-023 | N/a | Adjustable Wrench | Craftsman | Wrench | 8 Inch
Record:
No Filter
Search

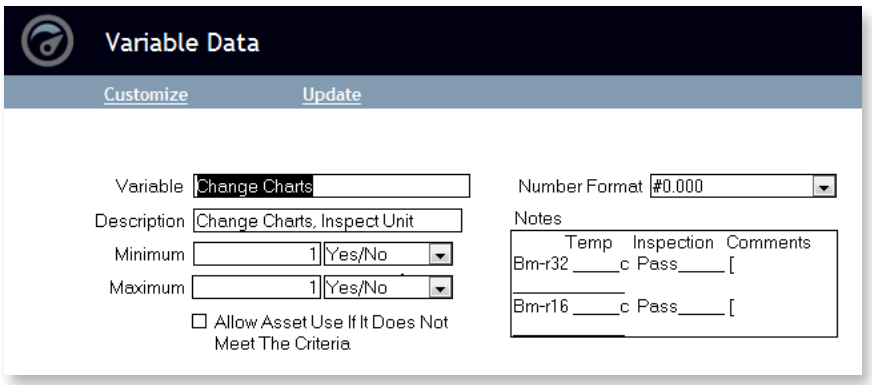
Suppliers – Purchase Orders Tab

The **Purchase Orders** tab automatically generates all order information associated with this supplier. The fields are non-editable here. To modify records, close **Suppliers** to return to the Main Menu and then navigate to **Inventory -> Edit Purchase Orders**. As you make the required changes to the purchase orders, the **Suppliers -> Purchase Orders** tab information is updated.



Variable Data Entry

A variable is a condition that might affect the maintenance or safe operation of an asset. These conditions should be checked during maintenance. Measured variables, such as temperature or pressure, should fall between a minimum and maximum. Enter variable information here and later assign the variable to a task.



Listed here are some possible variables for various types of assets:

Asset	Variable
Brake drum	Degrees of flatness
Motors	Oil temperature and oil pressure
Gears	Lash
Boilers/heaters/condensers	Fluid temperature
Pressure lines/reservoirs/accumulators	PSI
Electrical equipment	Amps
Outdoor machinery	Ambient air temperature and humidity
Handling/restraining equipment	Torque – foot-pounds
Flexible tensioning devices	Elasticity/resilience
Tires	Depth of tread
Repetitive production tools	Dimensional wear
Gages and measuring devices	Calibration tolerances
Plastic molding equipment	Durometer
Shafts	MM out of round

To enter variable records, navigate to **Data Administration -> Variable Data** and enter information into the fields as instructed below:

Variable: A unique alphanumeric name or code for each variable.

Description: A brief description of what the technician should test.

Minimum: The minimum acceptable measurement for this variable; use the field on the left for the numerical value and select the measurement unit from the drop-down list on the right.

Maximum: The maximum acceptable measurement for this variable; use the field on the left for the numerical value and select the measurement unit from the drop-down list on the right.

Allow the asset to be used if it does not meet the criteria: Check this checkbox if the asset can be used even if it does not meet the specified variable requirements. If this checkbox is checked, the record will appear in the result when using **Allow Use If Fail** variable report filters.

Number Format: The number of decimal places needed for the precision of the measurement.

Notes: Instructions for measuring or testing the variable, including how to check variables that can't be quantified.

Customize: Allows you to change all labels and font weights on this form.

Update: If you change an existing variable record, click this button to update associated task or asset records.

Chapter Six:
Work Orders

All jobs to be completed, either scheduled or unscheduled, can be created, viewed and edited within the **Work Orders** menu. Other options include batch completing work orders and viewing work due on each calendar day.

Scheduled Work Orders

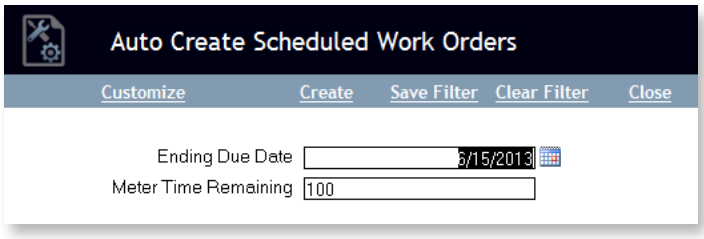
Once you have developed an asset-task record and set a schedule for it (see **Chapter Four: Entering Data for Preventative Maintenance**), FaciliWorks will generate a notification that a work order can be created. Work orders are not automatically created; you retain control of creating them.

There are a number of ways to create scheduled work orders. First, the **Auto Create Scheduled Work Orders** and **Manual Create Scheduled Work Orders** functions will be introduced.

Auto Create Scheduled Work Orders

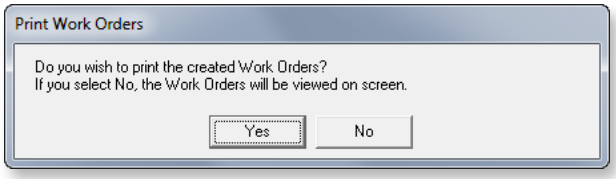
The **Auto Create Scheduled Work Orders** function will create all work orders for assets that have been scheduled. When the work orders have been created, FaciliWorks will preview the work orders for you. They can then be printed and distributed to the technicians who will be completing the work.

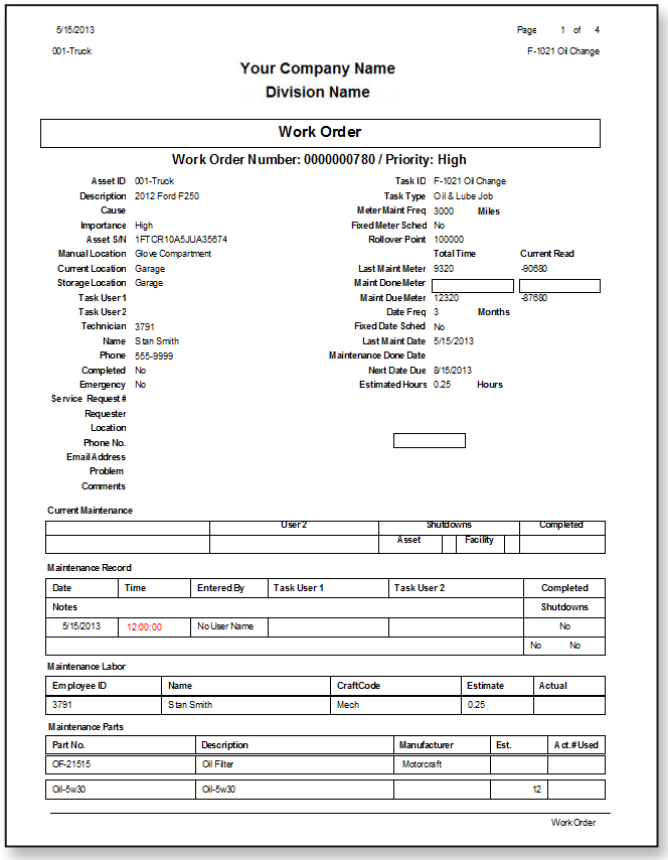
From the **Work Orders** menu, click **Auto Create Scheduled Work Orders**. A filter is displayed that allows you to create all work orders for maintenance tasks due before a certain date (FaciliWorks automatically fills in a date one month from the current date). To change the default date, type the new date in the **Ending Due Date** field.



The work order can also be created for tasks due based on a meter reading (default is 100). To change the default reading, type the amount of **Meter Time Remaining**. If you want to save the new values as the default values for the filter, click **Save Filter**. Click **Clear Filter** to remove the filter values; click **Close** to return to the Main Menu.

To create the work orders based on the filter criteria, click the **Create** button. FaciliWorks creates the work orders and asks if you want to print them immediately or view them first:


Print Work Orders
Do you wish to print the created Work Orders?
If you select No, the Work Orders will be viewed on screen.
Yes
No



5/15/2013 Page 1 of 4

001-Truck F-1021 Oil Change

Your Company Name
Division Name

Work Order

Work Order Number: 0000000780 / Priority: High

Asset ID	001-Truck	Task ID	F-1021 Oil Change		
Description	2012 Ford F250	Task Type	Oil & Lube Job		
Cause		Meter Maint Freq	3000 Miles		
Importance	High	Fixed Meter Sched	No		
Asset S/N	1FTCR10A5JUA35674	Rollover Point	100000		
Manual Location	Glove Compartment		Total Time	Current Read	
Current Location	Garage	Last Maint Meter	9320	-90680	
Storage Location	Garage	Maint Done Meter			
Task User 1		Maint Due Meter	12320	-87680	
Task User 2		Date Freq	3 Months		
Technician	3791	Fixed Date Sched	No		
Name	Stan Smith	Last Maint Date	5/15/2013		
Phone	555-9999	Maintenance Done Date			
Completed	No	Next Date Due	8/15/2013		
Emergency	No	Estimated Hours	0.25 Hours		
Service Request #					
Requester					
Location					
Phone No.					
Email Address					
Problem					
Comments					

Current Maintenance

	User 2	Shutdowns		Completed
		Asset	Facility	

Maintenance Record

Date	Time	Entered By	Task User 1	Task User 2	Completed
Notes					Shutdowns
5/15/2013	12:00:00	No User Name			No
					No No

Maintenance Labor

Employee ID	Name	CraftCode	Estimate	Actual
3791	Stan Smith	Mech	0.25	

Maintenance Parts

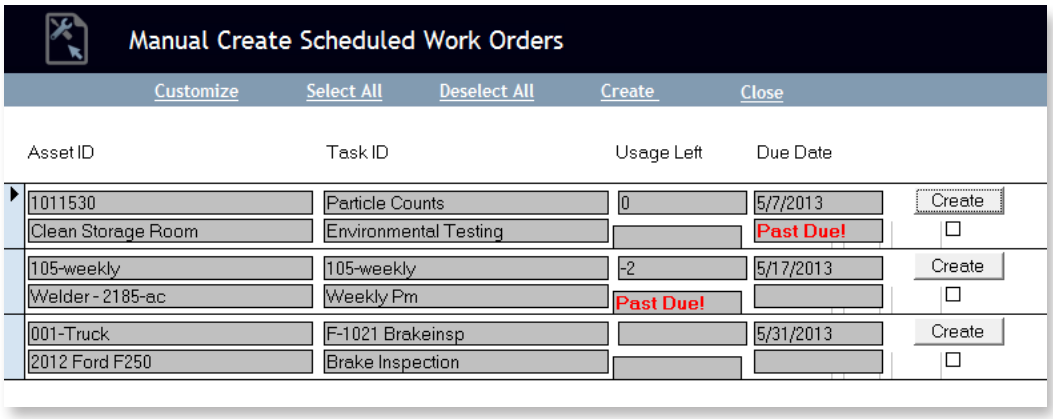
Part No.	Description	Manufacturer	Est.	Act.#Used
OF-21515	Oil Filter	Motorcraft		
Oil-5w30	Oil-5w30		12	

Work Order

The printed work order contains all of the asset and task information. It will also include all components needed for the work order that you previously defined for the task.

Manual Create Scheduled Work Orders

The **Manual Create Scheduled Work Orders** function allows you to selectively create work orders. From the **Work Orders** menu, click **Manual Create Scheduled Work Orders**. The following form opens:



The assets that are due for maintenance are displayed along with the due date and current meter usage remaining (if a meter-based schedule was defined for the task). Click the **Create** button to create the selected work order. To create multiple work orders, check all appropriate boxes below the **Create** buttons and then click the **Create** button on the green strip just below the form title. To create all work orders, click the **Select All** button and then click **Create**.

Important: The meter rollover feature does not affect **Auto Create Scheduled Work Orders** or **Manual Create Scheduled Work Orders** because these utilities operate on the difference between **Current Meter** and **Next Meter Due**. This value will be the same for both the left and right columns of these two fields. For example, if an asset's total **Current Meter** (left field) was 2260 when the total **Next Meter Due** value (left field) was 2300, the difference is 40 hours. When the actual **Current Meter** value (right field) was 10, the current **Next Meter Due** (right field) was 50. The difference between these two fields is also 40. Since this difference will always be the same value, the meter rollover feature does not affect either of these functions. For more information on the meter rollover feature, see the **Meter-based Schedule** section.

Unscheduled Work Orders

Unscheduled work orders are created for emergency work or other unscheduled maintenance tasks. The most efficient way to create an unscheduled work order is to build a generic repair task and store it in the database. This task can be very general, using Repair as the **Task ID**, or it can be general to a type of task such as Electrical Repair, Lighting Repair, Plumbing Repair, Wiring Repair, etc. Each component of the task can be left blank until the repair is required. Components within each tab can then be specified as the work order is created.

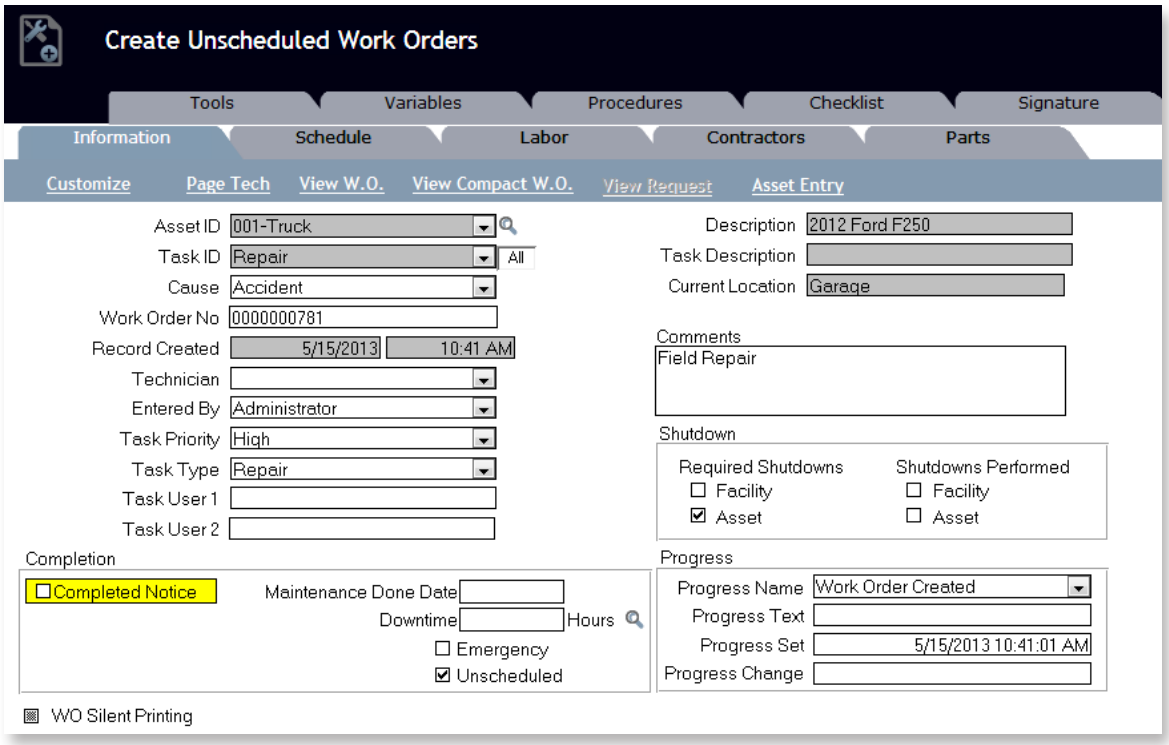
Navigate to **Data Administration -> Tasks**. To add a new repair task, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form. You only need to fill in the **Task ID** and **Task Description** fields to save the repair task in the database. Once you have created a generic repair task and stored it in the database, it can be attached to any asset requiring an unscheduled repair.

There are two ways to create an unscheduled work order: use the **Create Unscheduled Work Orders** function or the **Edit Work Orders** function found in the **Work Orders** menu. The two forms contain the same data format. **Edit Work Orders** will be discussed in the next section.

Create Unscheduled Work Orders

Create Unscheduled Works Orders – Information Tab

There are two pieces of information that are required for creating an unscheduled work order: **Asset ID** and **Task ID**. On the **Information** tab, select the asset to be maintained by using the drop-down list in the **Asset ID** field. Next, to select the generic Repair task, click the **All** button to the right of the **Task ID** field and then select the Repair task from the drop-down list in the **Task ID** field. Any information that you previously entered for the Repair task will auto-fill on the form including all task components found under each tab.



When using this form, the unscheduled work order is created before the work is carried out by the tech. Fill in all task component information within each component tab in the same manner as you did when first creating a task (see **Tasks** in **Chapter Four**). Notice that the **Unscheduled** checkbox is checked to indicate an unscheduled work order. Once all component information is entered, the work order can be printed and given to the technician to complete the work. To close the form, click the **File** tab on the ribbon at the top of the form and then click the **Close** button.

After the unscheduled work order has been created, go to the **Work Orders** menu and click **Edit Work Orders** to edit and complete.

The remaining fields on the **Create Unscheduled Work Orders -> Information** tab are described as follows:

Asset ID and **Description**: Select the **Asset ID** from the drop-down list; the **Description** field will auto-fill from the asset entry form.

Task ID: When you open the **Information** tab, the **Task ID** drop-down list will show only tasks linked to the selected **Asset**. To see all of the tasks in your database, click the **All** button next to the **Task ID** field and then select a task from the **Task ID** drop-down list. To change the list to show only tasks linked to the asset, click **All** again.

Task Description: This field auto-fills when a **Task ID** is selected; it can be edited only in the **Asset Entry** and **Task Entry** modules.

Cause: Select the basis for the work order (your system administrator creates this list during program setup – see **Work Order Cause Entry** in **Chapter Thirteen**).

Current Location: The current location of the asset auto-fills from the **Assets -> Information** tab.

Work Order No.: FaciliWorks automatically assigns a number to this work order, based on the format your system administrator created in the **Setup -> Settings -> Auto Numbering** tab.

Request No.: If a service request was created for this asset, FaciliWorks automatically enters the service request number in this field. If no service request was created, this field will not display.

Record Created: When you create a new work order record, FaciliWorks automatically inserts the current date and time into these fields; they cannot be edited.

Technician: The **Staff ID** of the technician assigned to this task is displayed. If necessary, you can select a different technician.

Entered By: Select the creator of this work order.

Task Priority: This field describes the importance assigned to the task.

Task Type: FaciliWorks auto-fills this information from the task (or asset) record. This field is editable.

Task User 1 and **Task User 2**: These custom fields are used for additional information pertaining to the task.

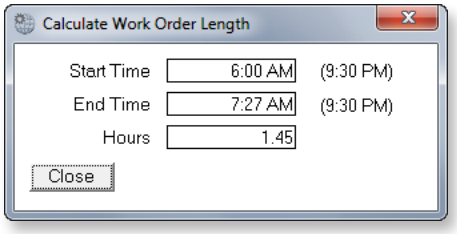
Comments: Any information that you enter in this field will appear in the **Work Order History** report, **Work Order Cost** reports and on the printed work order.

Required Shutdowns and **Shutdowns Performed**: If you must shut down the asset and/or the facility to perform the maintenance task, checkmarks will appear in the appropriate checkboxes. Place a check in the corresponding **Shutdowns Performed** box when the work has been performed.

Completed Notice: When the task is complete, check this checkbox. Checking **Completed Notice** closes the work order, deducts parts used, charges cost centers and completes the information regarding the open work order.

Maintenance Done Date: The completion date of maintenance work for this task.

Downtime: Enter the actual number of hours it took to complete the work. To calculate the number of hours, double-click the text field or click the magnifying glass icon to display the downtime calculator, shown here. Enter times in the format shown:



Emergency: Check this checkbox for emergency maintenance.

Unscheduled: This box is automatically checked if the work order is not part of the asset's routine maintenance.

Progress Name: This field shows the status of the work order. By default, FaciliWorks automatically updates the status of work orders when they are created or completed. The status of the work order can be edited using the drop-down list. To edit progress names and reset triggers, see **Work Order/Service Request Progress** in **Chapter Thirteen**.

Progress Text: Enter comments on the status of the work order, e.g., "Part Number X-0011 on backorder."

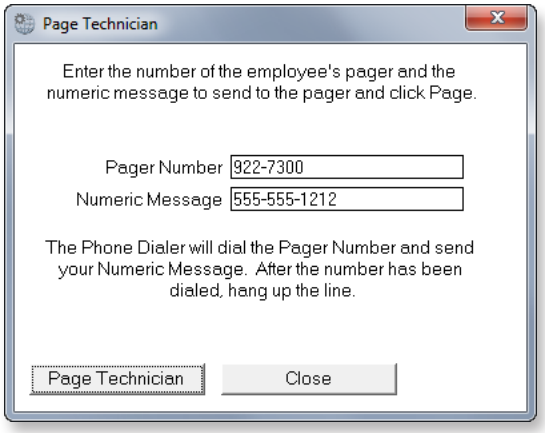
Progress Set: FaciliWorks automatically enters the date and time of the last change in the progress of this work order. This field can be edited.

Progress Change: Enter the date you expect the progress of this work order to change next; e.g., if you are waiting for a part, enter the date on which you expect to receive the part.

WO Silent Printing: With this box checked, click the **View W.O.** button; rather than displaying a print preview of the work order in FaciliWorks, the work order is sent to print.

Customize: Use this button to modify the form labels and font weight of any form labels.

Page Tech: You must select a **Technician** before using this feature. Click this button to call the assigned technician's pager to leave a message. This form appears:


Page Technician
Enter the number of the employee's pager and the numeric message to send to the pager and click Page.
Pager Number
922-7300
Numeric Message
555-555-1212
The Phone Dialer will dial the Pager Number and send your Numeric Message. After the number has been dialed, hang up the line.
Page Technician
Close

To page the employee, click the **Page Technician** button. FaciliWorks sends the numeric message to the employee's pager. You must enter the pager number in **Staff Entry** before you can page the employee from this form. **Note**: The first time you use this feature, FaciliWorks asks you to select the appropriate COM port (select COM1, COM2, COM3 or COM4 depending on your hardware).

View W.O.: To preview the work order, click this button. From the preview window, the work order can be printed, exported or emailed. The printed work order will include all of the information that applies to the task.

View Compact W.O.: Click this button to see a summarized version of the work order with full procedure text.

View Request: Clicking this button opens a print preview of the **Service Request** associated with this work order. This button will be disabled if the work order was not created from a service request.

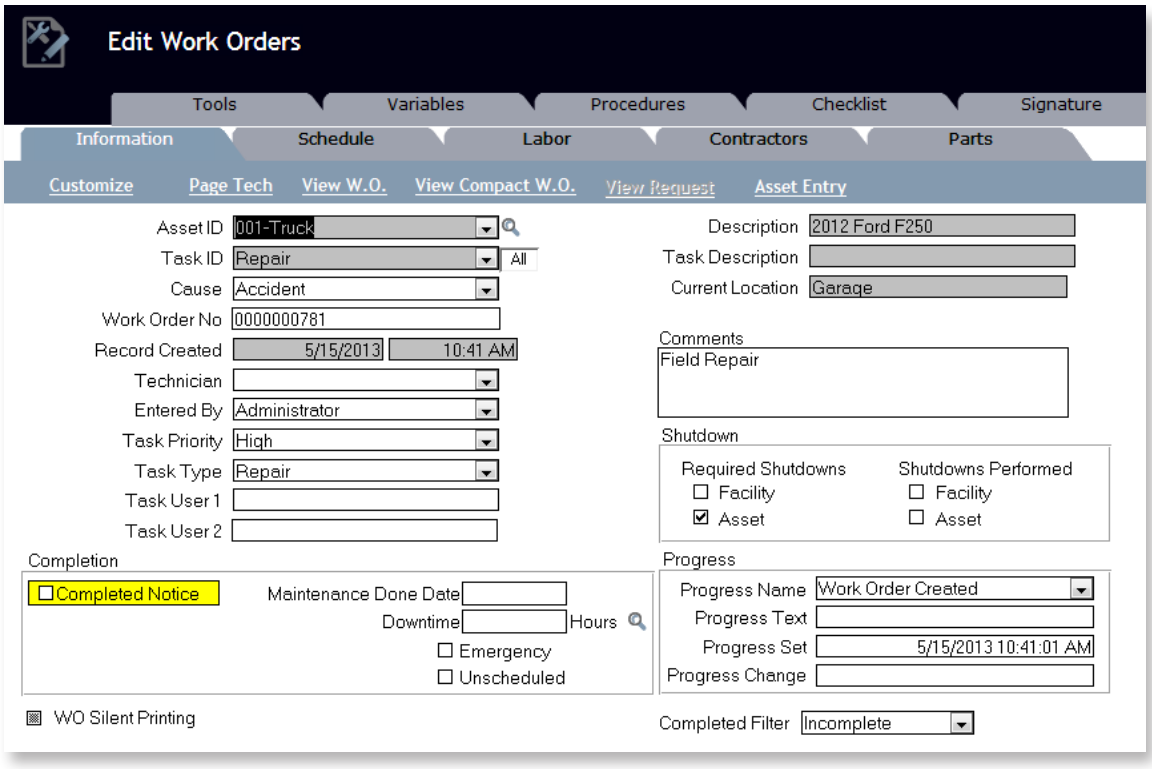
Asset Entry: Opens **Asset Entry**, displaying the asset referenced in the work order.

Edit Work Orders

In addition to using the **Create Unscheduled Work Orders** function, unscheduled work orders can also be created using **Edit Work Orders**. This form can be used either before or after the work is completed and it will also automatically flag the work order as unscheduled when you select a **Task ID** from the drop-down list. Fill in the work order task components and complete the work order as instructed in preceding examples.

The **Edit Work Orders** function is also used to modify and complete work orders after they've been created in **Manual Create Scheduled Work Orders** or **Auto Create Scheduled Work Orders**.

Navigate to **Work Orders -> Edit Work Orders**. The following form is displayed. Note that this form is identical to the form found in **Create Unscheduled Work Orders**:

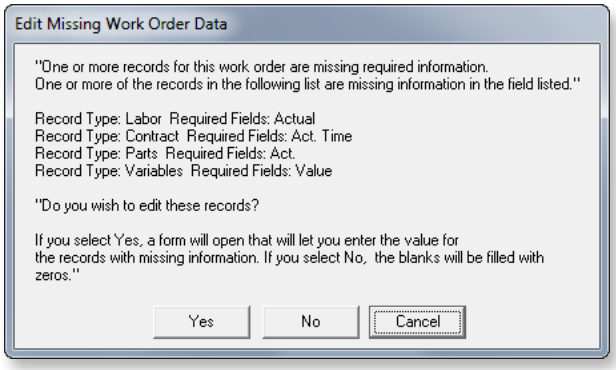


Although all complete and incomplete work orders can be viewed here, FaciliWorks will display by default only those work orders that are incomplete. This is indicated by the **Filtered** button at the bottom of the form. To show all work orders (unfilter the records), click the **Filtered** button to deactivate it.

Each tab on this form displays the same information as the task component tabs. Simply click each tab to edit or complete the information. Once the work order has been edited, it can be printed and given to the technician who will complete the work. Click the **View W.O.** button; from this screen you can print or export the work order.

When you are ready to complete the work order, check the **Completed Notice** checkbox.

If any information is missing from any of the task component tabs, FaciliWorks will display a message similar to the following:


Edit Missing Work Order Data
"One or more records for this work order are missing required information.
One or more of the records in the following list are missing information in the field listed."
Record Type: Labor Required Fields: Actual
Record Type: Contract Required Fields: Act. Time
Record Type: Parts Required Fields: Act.
Record Type: Variables Required Fields: Value
"Do you wish to edit these records?
If you select Yes, a form will open that will let you enter the value for
the records with missing information. If you select No, the blanks will be filled with
zeros."
Yes
No
Cancel

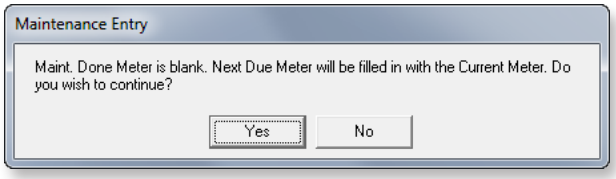
If you choose to edit the records, a form will open allowing you to enter the information. Simply type the values into the editable text boxes (you can only edit the white text boxes). When you are finished, close the window. If you choose not to supply the information at this time, zeros will be placed in those fields.

If you have not already entered the **Maintenance Done Date**, FaciliWorks will display this message:

Maintenance Entry
Maint. Done Date is blank. Maint. Done
Date will be filled in with today's date
Do you wish to continue?
Yes
No

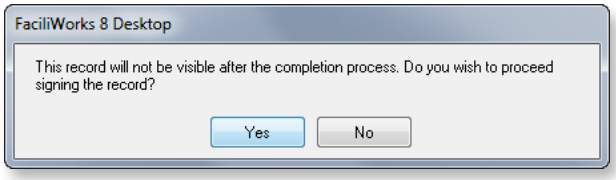
Click **Yes** or **No**, depending on your preference.

Depending on the asset's schedule, you may also receive this message:

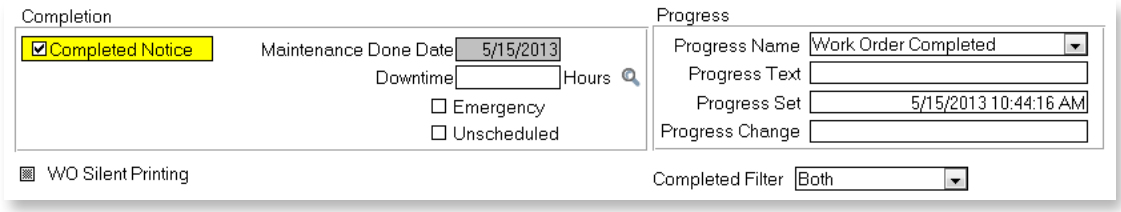

Maintenance Entry
Maint. Done Meter is blank. Next Due Meter will be filled in with the Current Meter. Do
you wish to continue?
Yes
No

Click **Yes** or **No**, depending on your preference.

The record won't be visible by default after completion; to view it, unfilter the records. If security is enabled, you will be prompted to go to the **Signature** tab to sign the record:


FaciliWorks 8 Desktop
This record will not be visible after the completion process. Do you wish to proceed signing the record?
Yes
No

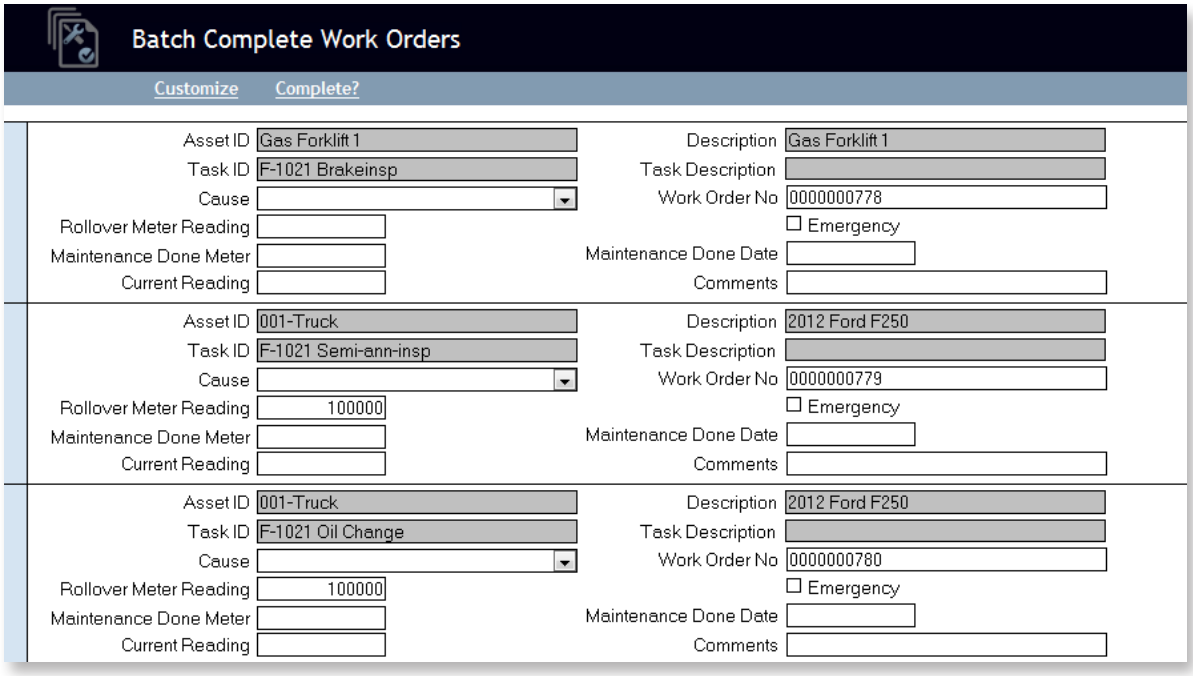
The **Completed Notice** checkbox is now checked and the **Maintenance Done Date** is filled in. The **Progress Name** is also updated to indicate that the work order has been completed.



Now that the work order is complete, FaciliWorks automatically creates a notification that a work order is to be created for the work in the next cycle. To create the new work order, use **Auto Create Scheduled Work Orders** or **Manual Create Scheduled Work Orders**.

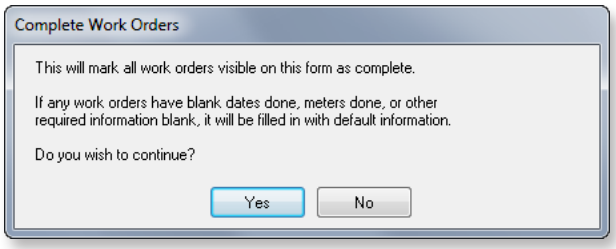
Batch Complete Work Orders

To designate all work orders as completed, navigate to **Work Orders -> Batch Complete Work Orders**. A list of all incomplete work orders in the system is displayed.

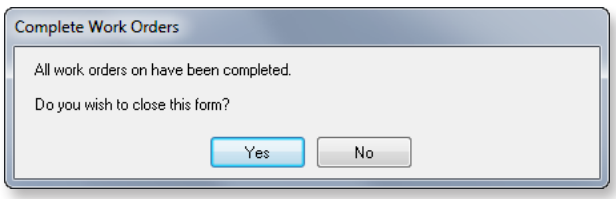


Use the **Customize** button to modify the form labels and font weight of any form labels.

Click the **Complete?** button and FaciliWorks will prompt you to continue:


Complete Work Orders
This will mark all work orders visible on this form as complete.
If any work orders have blank dates done, meters done, or other required information blank, it will be filled in with default information.
Do you wish to continue?
Yes
No

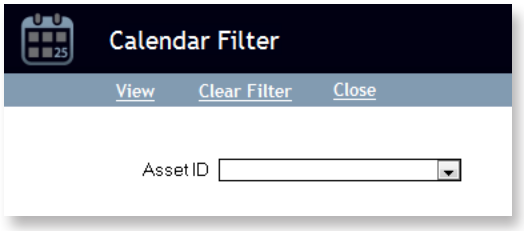
If you click **Yes**, FaciliWorks will complete the work orders and display a confirmation message:



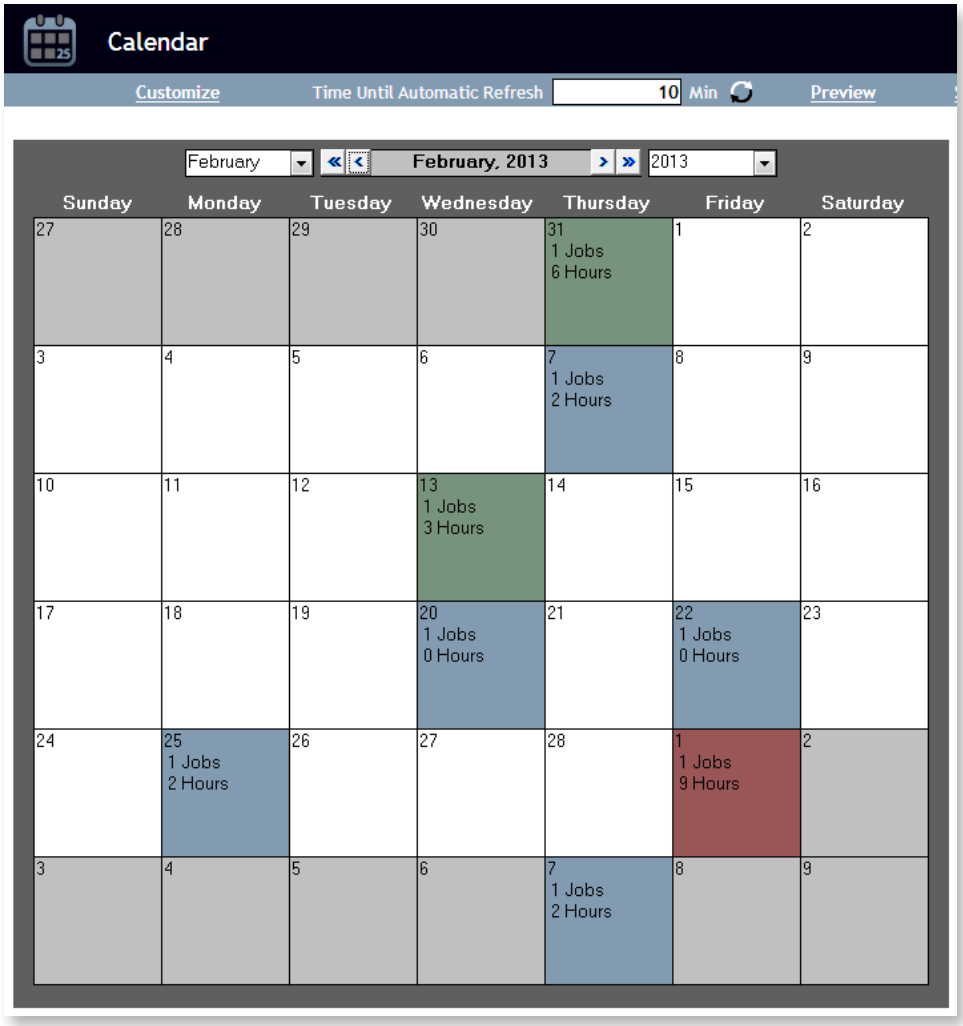
If you click **Yes** in this message, the form will close and you'll be returned to the **Work Orders** menu. To view the completed work orders, click **Edit Work Orders** and unfilter the list (this action shows all work orders, instead of only showing those that are incomplete).

Calendar

The calendar shows a summary of your maintenance schedule, including the number of jobs and hours for each day of the month. Navigate to **Work Orders -> Calendar**; the **Calendar Filter** appears:



Select an asset from the **Asset ID** drop-down list to filter the calendar to a single asset or to see all assets, leave the **Asset ID** field blank. Then click **View** to see the calendar:

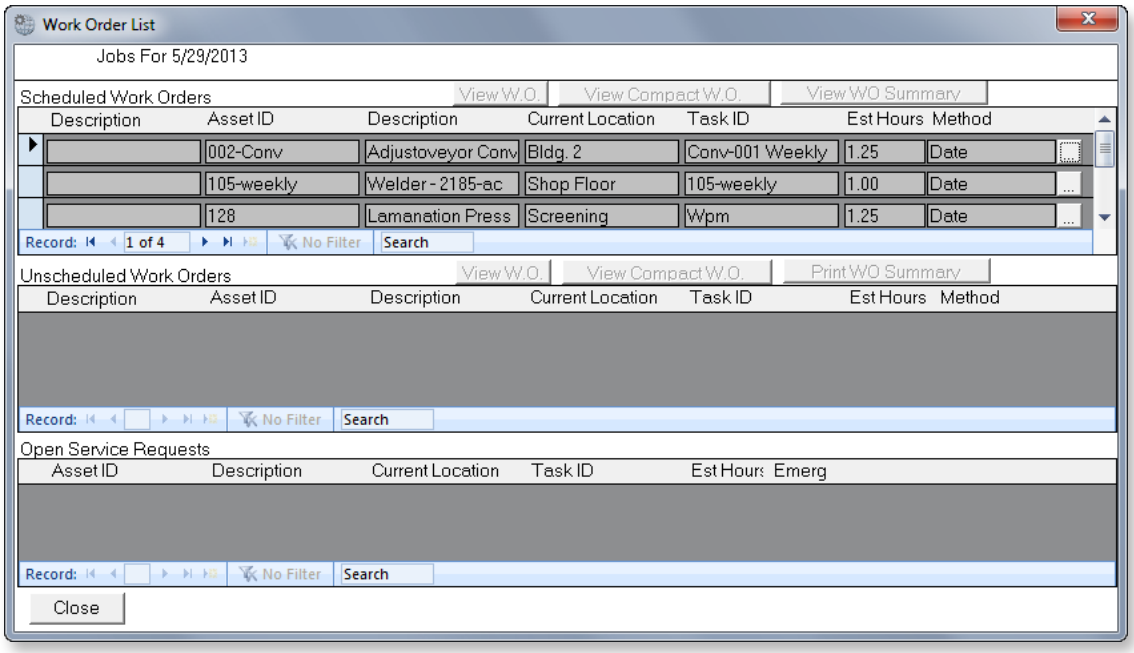


You can use this feature in several different ways:

If you're using FaciliWorks on a network, with all users sharing the same data file, you might use one workstation to constantly display the calendar for your maintenance personnel. FaciliWorks automatically updates the display according to your program setup (for more information, see the **Setup -> Settings -> Calendar** tab in **Chapter Thirteen**. This includes color-coding the number of jobs per day to get a quick visual on the day ahead.

On your individual workstation, you can open the calendar at any time to view past, present and future maintenance activity. Because FaciliWorks automatically calculates the due dates for all asset-tasks for the next year, you can see your entire projected workload for the next 12 months.

The calendar contains a hidden maintenance **Work Order List** for each day. To view the **Work Order List**, click the calendar date; the list of jobs for that day will display:



The work order list includes all scheduled and unscheduled work and open service requests. Click the **[...]** button to the right of any record to view the details of that record.

FaciliWorks automatically updates the **Work Order List** according to the most recent information entered into your database.

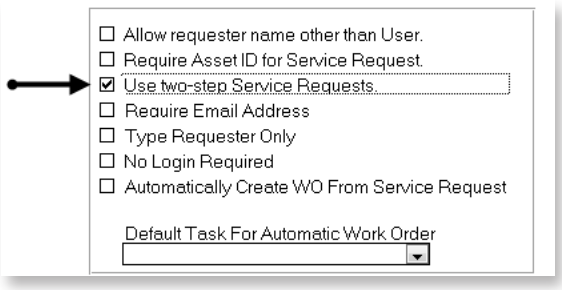
Chapter Seven:
Service Requests

Service Requests are typically utilized by employees outside of the maintenance/facilities group to alert maintenance staff to work that must be completed. This can be anything from changing a light fixture to hanging a white board, to repairing a leak. The request either goes through a two-step approval process or a work order is automatically created for the job. All service request activities are handled through the **Service Request** menu.

Two-Step Service Requests

Service request records can be viewed and edited by users with full access rights. Further, administrative users can immediately create work orders based on service requests.

To use the two-step approval option, navigate to the **Setup -> Settings -> Options** tab. In the service request options group, check the **Use two-step Service Requests** checkbox. If security is enabled, you must have administrative permissions to change settings.

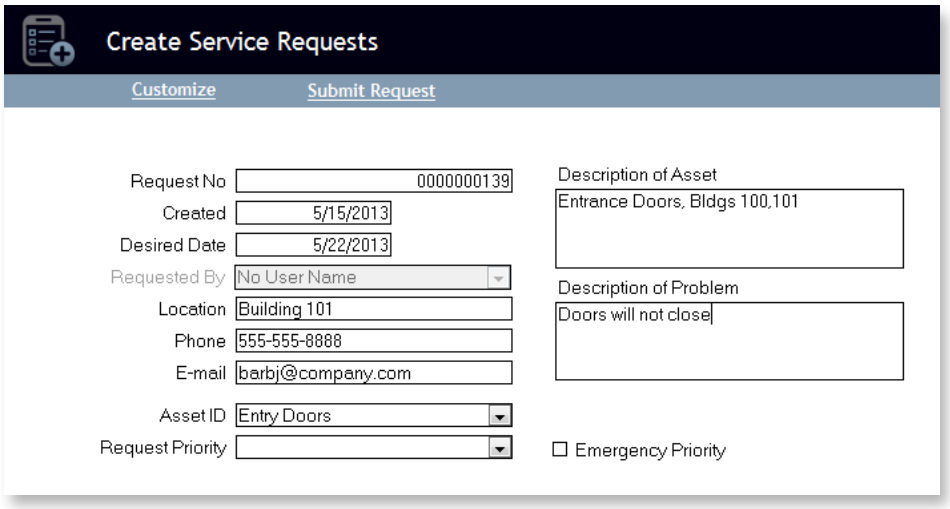

Allow requester name other than User.
Require Asset ID for Service Request.
Use two-step Service Requests.
Require Email Address
Type Requester Only
No Login Required
Automatically Create WO From Service Request
Default Task For Automatic Work Order

When the **Two-Step Service Request** option is activated, any service requests will require prior approval from a user with full security rights or administrative rights. If the two-step option is disabled, all service requests created are automatically approved.

Other options on this form will be discussed further in the **Settings** section of **Chapter Thirteen**.

Create Service Requests

From the Main Menu, navigate to **Service Requests -> Create Service Requests** to create a new service request.



A **Request No** is automatically generated by FaciliWorks based on the formatting scheme defined in the **Setup -> Settings -> Auto Numbering** tab.

The **Created** date is the current date and by default; the **Desired Date** will be generated as one week from the **Created** date unless the **Emergency Priority** checkbox is checked.

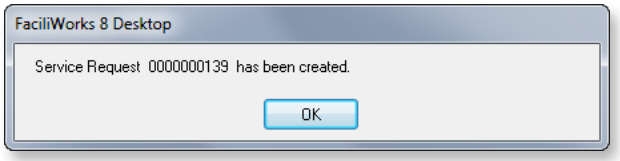
If the **Emergency Priority** box is checked, FaciliWorks will automatically set the **Desired Date** to be the same as the **Created** date. All date fields can be edited to your personal preferences.

The **Location**, **Phone** and **E-mail** fields will auto-generate from the staff records, identified by the login information. If security is disabled, these fields will be blank and can be filled in manually. If the requester is to receive an email notification that the service request was submitted, the requester must enter his/her email information. See the **Edit Service Requests -> Notification** tab for more information.

To complete the form, fill in the remaining fields. The **Asset ID** field may or may not be required, depending on your program settings. If an **Asset ID** is selected, the **Description of Asset** field will auto-fill. If service requests are submitted by people outside the facilities/maintenance group, they most likely will not know the **Asset ID**. For this reason, it is important to enter a detailed but brief **Description of Asset**.

Select a **Request Priority** using the drop-down list. Enter a detailed but brief **Description of Problem**.

To save the record, you can navigate to a new blank record to enter a new service request, click **Submit Request**, click the **Record Selector Bar** on the left of the window or close the form to return to the **Service Requests** menu. You will receive a confirmation message that the service request has been created:

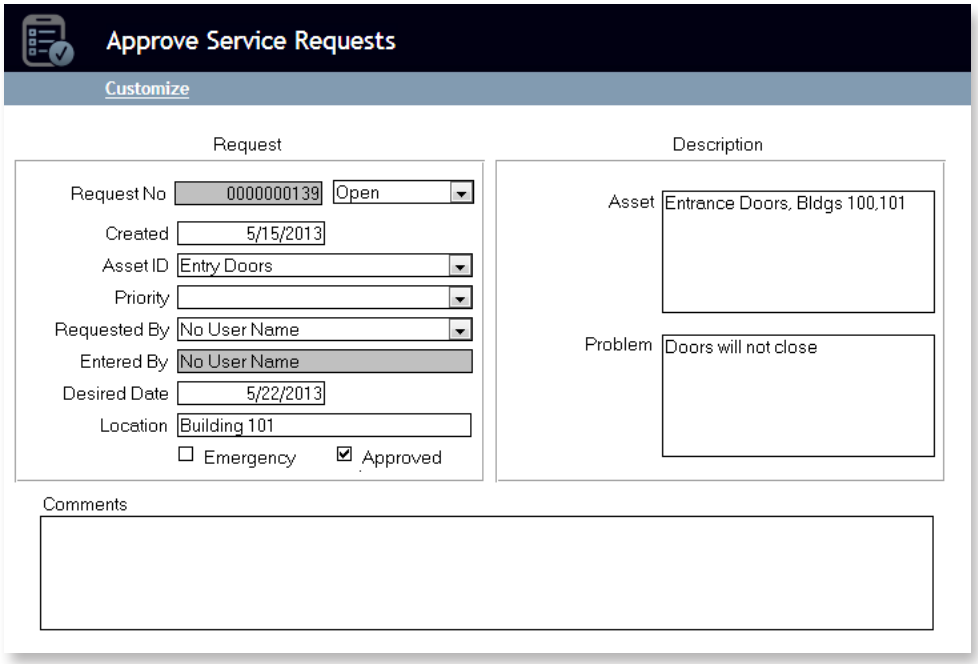


Click **OK** to close the message. If the **Two-step Service Requests** option is disabled, the service request is automatically approved, immediately becomes a work order and can be accessed via the **Work Order** menu. If the **Two-step Service Requests** option is enabled, the service request must be manually approved via **Approve Service Requests**.

Approve Service Requests

Before service requests are advanced to work orders, they must first be approved (unless the **Two-step Service Request** option is disabled, in which case, the request automatically becomes a work order). From the **Service Requests** menu, click **Approve Service Requests**. You must have the proper permission status to approve the request (for setting permissions of this sort, see the **Group Permissions** tab in **Chapter Nine**).

Most of these fields are auto-filled with information entered in the **Create Service Request** form. To approve the service request, click the **Approved** checkbox. Fill in any necessary comments in the **Comments** field. If the **Asset ID** is known, it can be selected at this time by using the drop-down list.



If it is decided that the request will not be advanced to a work order, do one of the following:

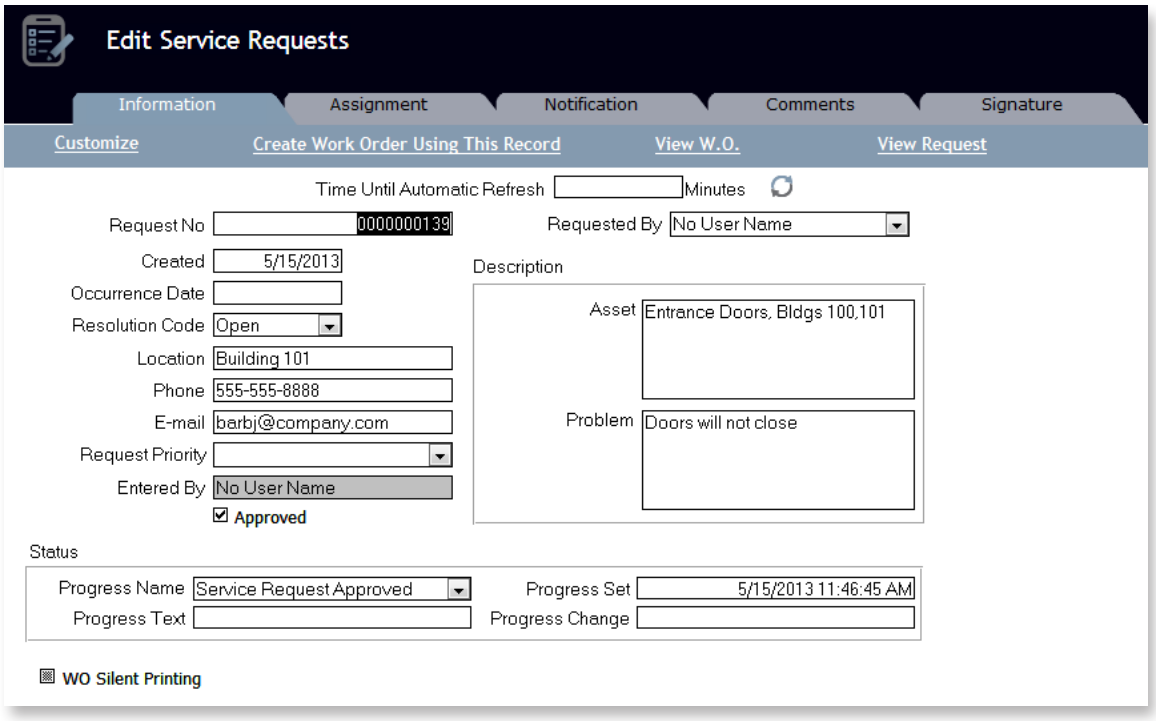
- Delete the service request record: From the Ribbon, select the **Records** tab, click the **Delete** drop-down list and then click **Delete Record**.
- Select **Closed** from the drop-down list to the right of the **Request No** field.
- Do not check the **Approved** checkbox.

To return to the **Service Requests** menu, close the **Approve Service Requests** form. The approved service request will be available in **Edit Service Requests** to create a work order.

Edit Service Requests

To edit service request records or to create work orders from service requests, navigate to **Service Requests -> Edit Service Requests**. If you have the proper permissions, a new request can be created here, approved and edited here.

Edit Service Requests – Information Tab



All fields are auto-filled from the **Approve Service Request** form. The **Approved** checkbox is checked and the **Progress Name** field in the **Status** pane confirms the approval of the service request. The original service request can be viewed and printed using the **View Request** button in the strip below the tab title.

Use the **Customize** button to modify the form labels and font weight of any form labels.

If it is decided that the request will not be advanced to a work order, do one of the following:

- Delete the service request record: From the Ribbon, select the **Records** tab, click the **Delete** drop-down list and then click **Delete Record**.
- Select **Closed** from the drop-down list to the right of the **Request No** field.
- Close the **Edit Service Request** form. The request will remain here until either deleted or advanced to a work order.

Information tab fields:

Time Until Automatic Refresh __ Minutes: The amount of time the program will wait before it updates the information in this form (based on program settings). Click the grey button at the right of this field to immediately update the form.

Request No: FaciliWorks assigns a consecutive number to each service request. The format for this number comes from program settings chosen in the **Setup -> Settings -> Auto Numbering** tab.

Requested By: This field displays the name of the person who initiated the service request.

Created: The date on which the service request was created appears in this field. If the service request is being created here, the current date automatically appears in this field.

Occurrence Date: The date on which the problem occurred.

Resolution Code: The status of the service request – Open or Closed.

Location: The location of the requester automatically populates this field if this information is available within **Staff Entry** for the name entered in the **Requested By** field. This field can be edited.

Phone: The phone number of the requester populates this field if this information is available within **Staff Entry** for the name entered in the **Requested By** field. This field can be edited.

E-mail: The requester's email address automatically populates this field if this information is available within **Staff Entry** for the name entered in the **Requested By** field. This field can be edited.

Request Priority: Select a priority for the service request or enter a new priority description.

Entered By: This field shows the user name of the person who submitted the service request; it cannot be edited.

Approved: If the service request has already been approved, this checkbox will be checked; otherwise, to approve the request, check the checkbox.

Asset: A brief description of the asset.

Problem: A detailed but brief description of the problem or service required.

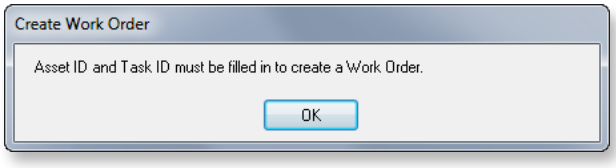
Progress Name: This field shows the status of the service request. By default, FaciliWorks automatically updates the status of service requests when they are created, approved or closed or when their associated work order is created, started or completed. This field can be edited using the drop-down menu.

Progress Text: Enter comments about the status of the service request, e.g., "Part Number X-0011 on backorder."

Progress Set: FaciliWorks automatically enters the date of the last change in the progress of this service request. This field can be edited.

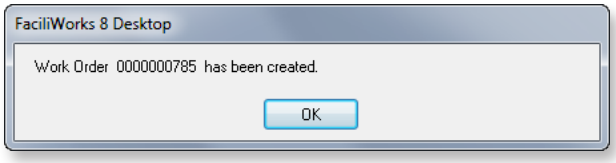
Progress Change: Enter the date you expect the progress of this service request to change next, i.e., if you are waiting for a part, enter the date on which you expect to receive the part.

Create Work Order Using This Record button: Before you can create a work order for this service request, you must first fill in the information on the **Assignment** tab (see the next section). If the information is missing, the following message will display:



Click **OK** to close the message. Open the **Assignment** tab to complete the information (see the next section for detailed information).

When finished, return to the **Information** tab to create the work order. You will receive the following acknowledgement that a work order has been created:

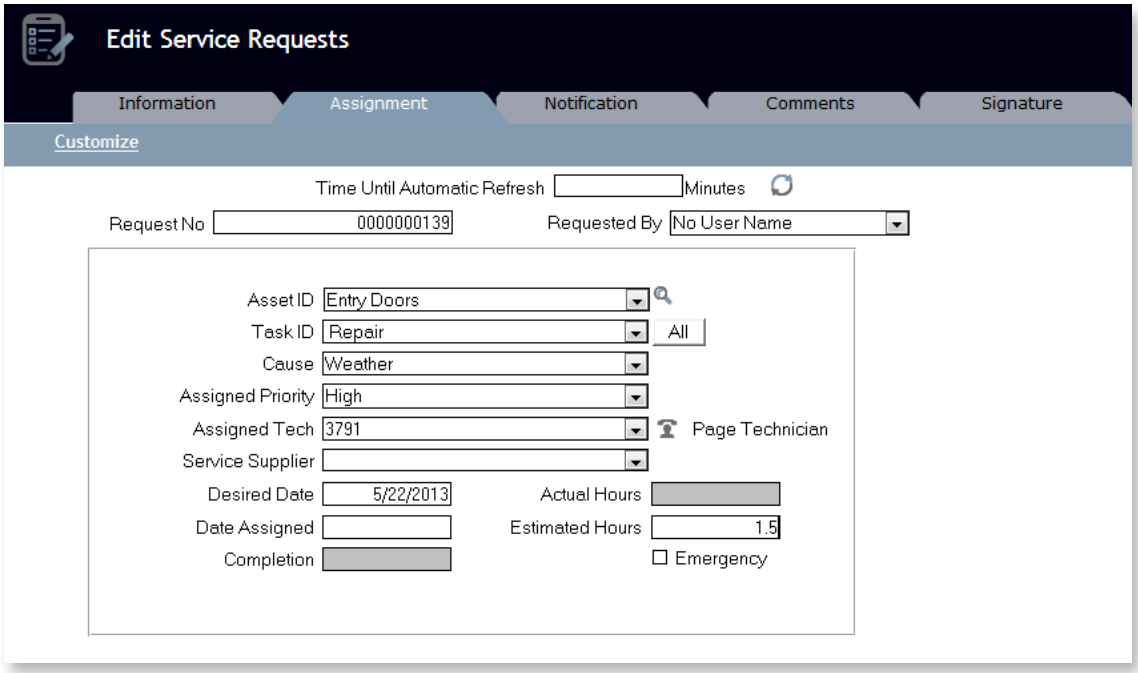


Click **OK** to close the message.

To view the work order associated with the service request (if the work order has already been created), click the **View W.O.** button. From this window, the work order can be printed, emailed or exported. To print the associated work order without previewing it, check the **WO Silent Printing** checkbox and then click the **View W.O.** button.

Edit Service Requests – Assignment Tab

The **Assignment** tab captures specific information needed to create a work order for the request.



Time Until Automatic Refresh __ Minutes: The amount of time the program will wait before it updates the information in this form. Click the button at the right of this field to immediately update the form.

Request No: This field is auto-filled from the **Information** tab.

Requested By: This field is auto-filled from the **Information** tab.

Asset ID: This field may already be populated with the **Asset ID** if it was entered during earlier steps of the service request process; if not, select an **Asset ID** from the drop-down list.

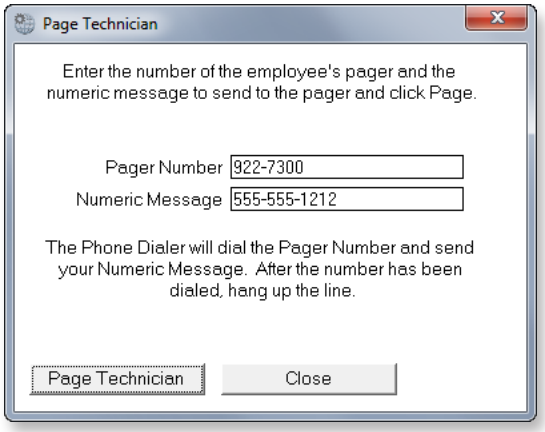
Task ID: Select the **Task ID** from the drop-down menu. This list shows only tasks linked to this asset. Click the **All** button next to this field to see all of the tasks in your database (click it again to go back to the original list).

Cause: Enter the basis for the service request. Causes are defined in the **Setup** menu.

Assigned Priority: This editable field displays the priority originally given to the task.

Assigned Tech: This editable field displays the name of the technician originally assigned to the task.

Page Technician: You must select a **Technician** before using this feature. Click the **P** button to call the assigned technician's pager to leave a message. This form appears:


Page Technician
Enter the number of the employee's pager and the numeric message to send to the pager and click Page.
Pager Number
922-7300
Numeric Message
555-555-1212
The Phone Dialer will dial the Pager Number and send your Numeric Message. After the number has been dialed, hang up the line.
Page Technician
Close

To page the employee, click the **Page Technician** button. FaciliWorks sends the numeric message to the employee's pager. You must enter the pager number in **Staff Entry** before you can page the employee from this form.

Service Supplier: This editable field displays name of the service supplier originally linked to the task.

Desired Date: Enter the date on which work should be completed. FaciliWorks automatically assigns a date of one week from the current date, unless the request is an emergency.

Date Assigned: This field displays the date on which the task was assigned.

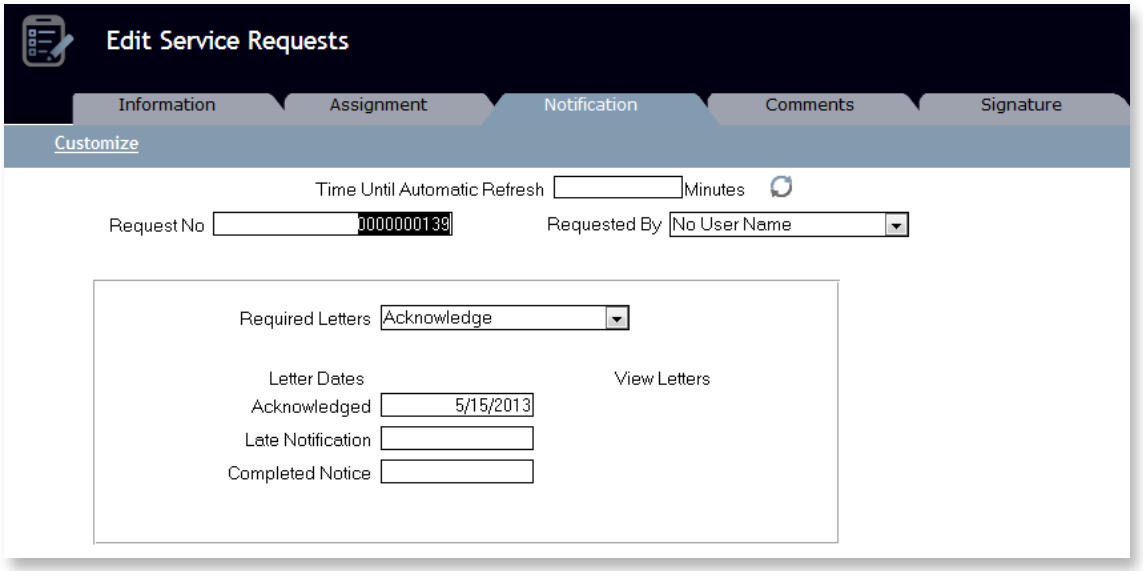
Completion and **Actual Hours**: When the technician completes the work and the work order data is entered, the completion date and actual hours spent automatically appear in these fields.

Estimated Hours: Enter the estimated hours for the task. This field is editable.

Emergency: Check this box to indicate that this request is for emergency maintenance.

Edit Service Requests – Notification Tab

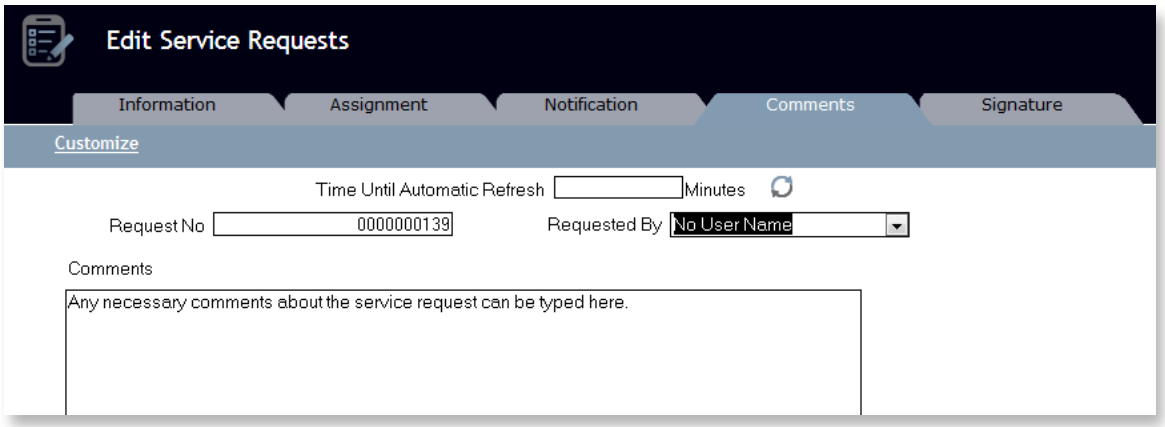
This form allows you to create, print or email correspondence related to service requests, including acknowledgments, late notifications and completion notices. If you send letters from this form, FaciliWorks automatically puts the current date in the appropriate **Letter Dates** fields. All fields are editable. To preview each letter, click the appropriate **View Letters** button. These letters are pre-formatted and can be modified from within the **Setup** menu (see **Service Request Letter Entry**).



The **Request No** and **Requested By** fields are automatically populated. Use the **Required Letters** drop-down list to select the type of letter. For instance, if you select **Acknowledge** from the **Required Letters** drop-down list, the **Acknowledged** field (in the **Letter Dates** column) will be populated with today's date. In the **View Letters** column, click **Acknowledge** to see a print preview of the letter. From the preview window, the letter can be printed, exported or emailed.

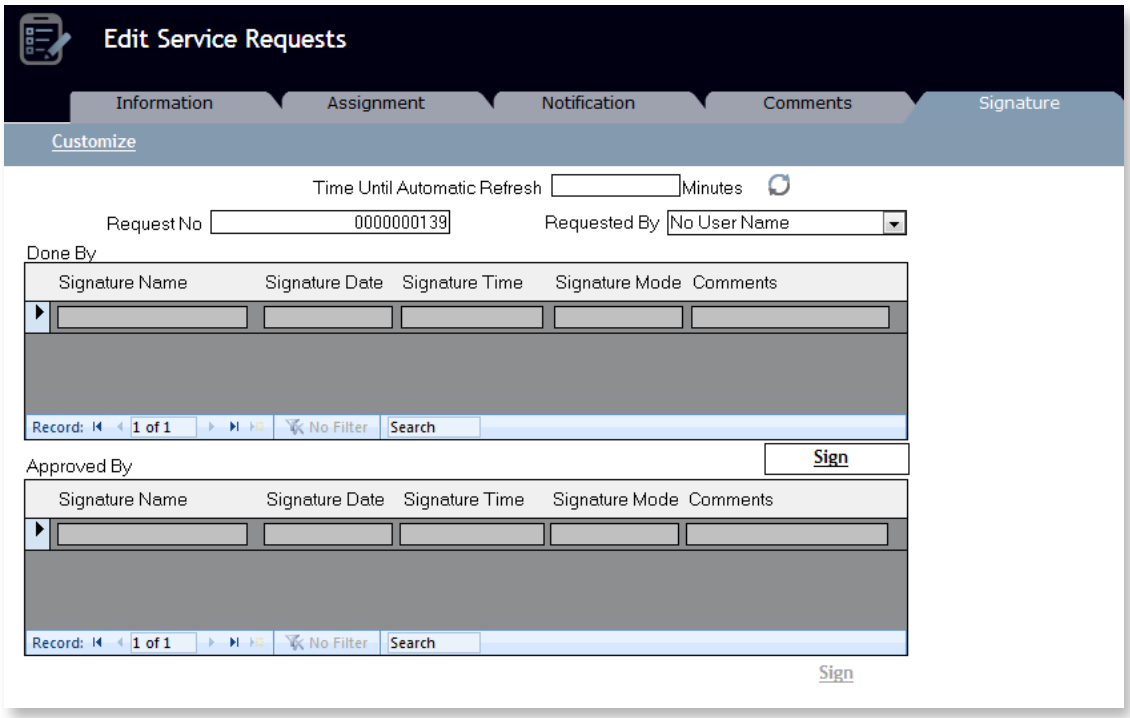
Edit Service Requests – Comments Tab

The **Comments** field automatically displays any comments that were entered during previous steps of the service request process. Here in the **Comments** tab, the comments can be modified.



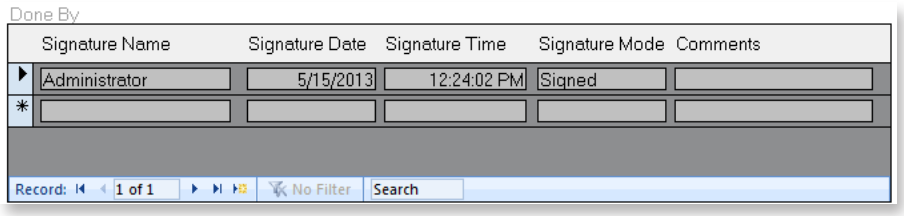
Edit Service Requests – Signature Tab

To use the signature feature, security must be enabled via the **Setup -> Settings -> Security** tab.



To sign a record as completed, click the **Sign** button under the **Done By** pane; you are prompted for your login credentials:

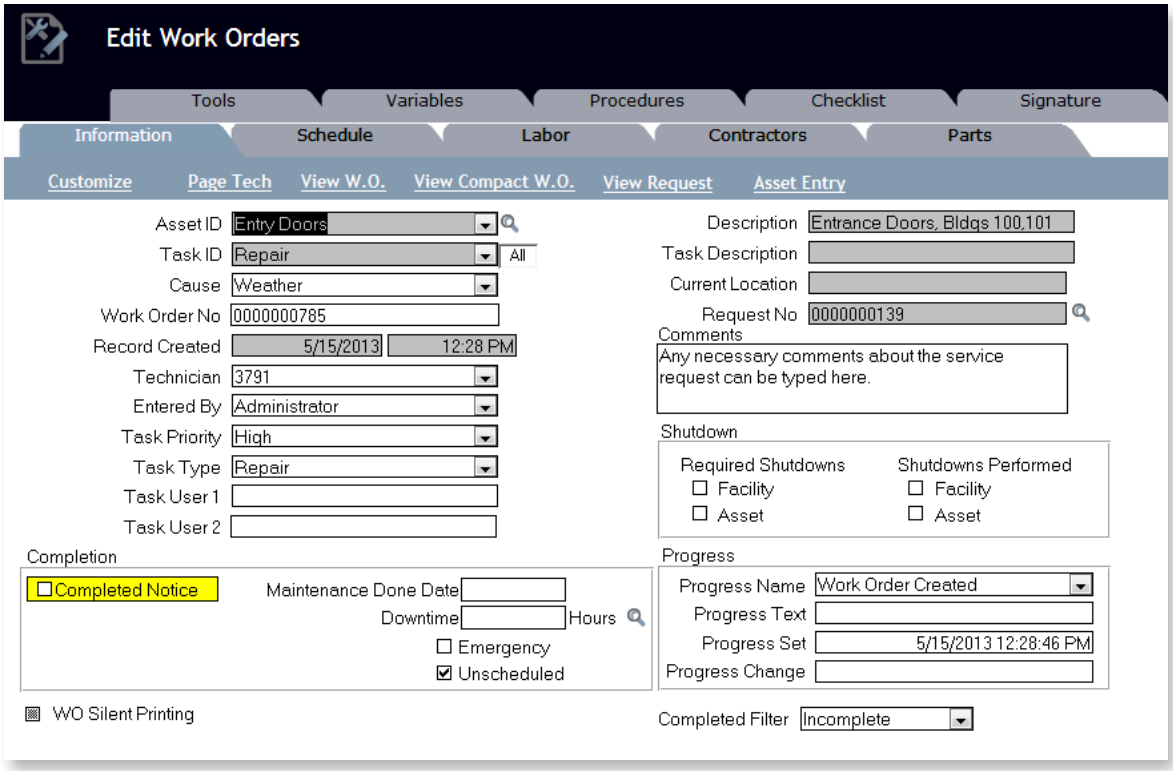
Enter your login credentials and then click **OK**. This creates a new signature record containing the user's name, the date and the exact time and the former **Sign** button is now an **Unsign** button:



Once the **Done By** pane has been signed, the **Approved By** pane can be signed in the same fashion. Once a record has been signed, it can be made editable only if the original signer unsigns it; if the record's approval has been signed, the approval must be unsigned by the person who signed it before the record can be unsigned.

Closing a Service Request by Completing the Work Order

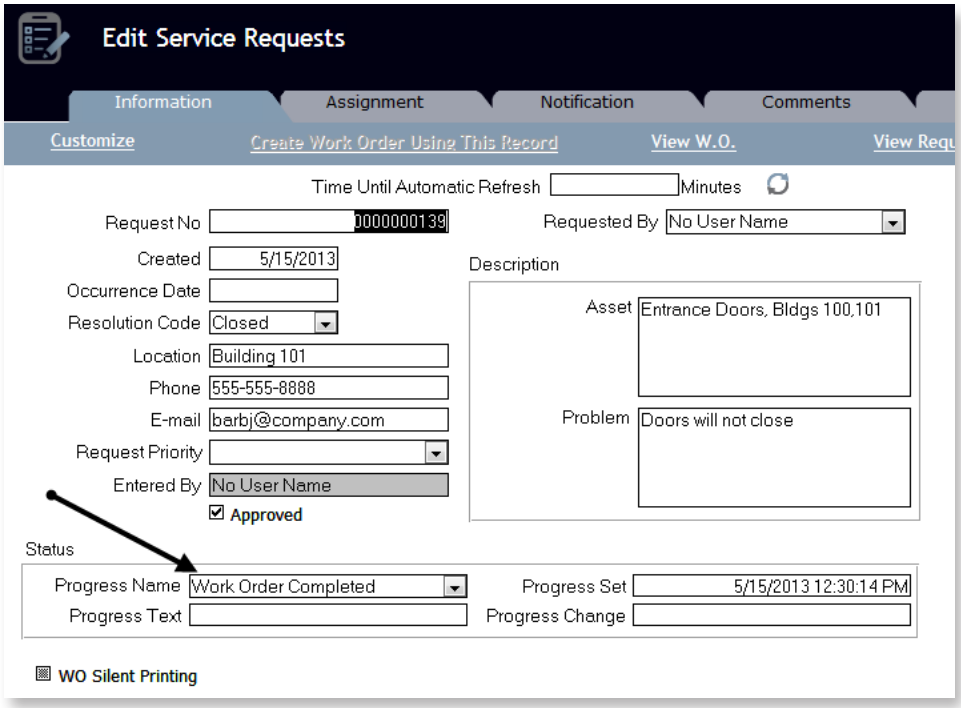
Once a work order is created for the service request, the work order can be edited and completed. To retrieve the work order, navigate to **Work Orders -> Edit Work Orders**.



When a work order has emergency priority status, this screen will reflect that in a red box underneath the **Completed Notice** checkbox. This order is also specified as unscheduled, as it originated from a service request. Work orders that originate this way include a **Request No** shown above the **Comments** field.

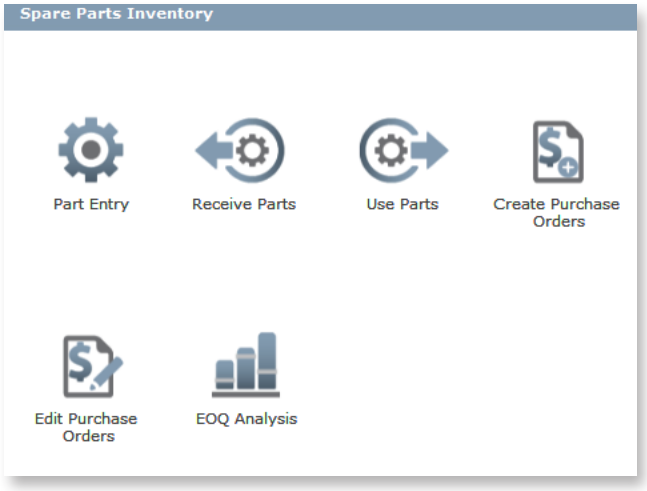
Complete the work order. Any task information for this repair is completed within each task component tab. Upon checking the **Completed Notice** box, the **Emergency Priority** box changes to green. The **Progress Name** field is updated to show **Work Order Completed**.

The service request record in **Edit Service Requests** is similarly updated, i.e., the **Resolution Code** now reads Closed and **Progress Name** shows Work Order Completed:



Chapter Eight:
Spare Parts Inventory

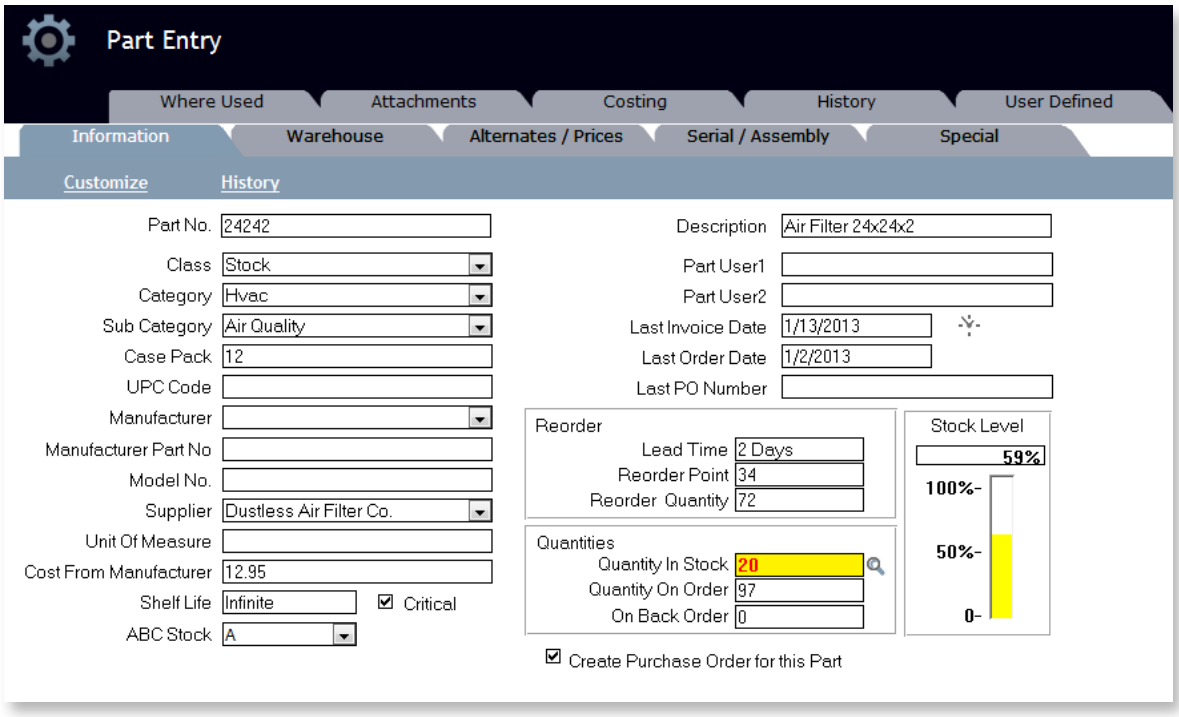
Track spare parts inventory and purchase orders, receive parts into stock, record where the parts are used by identifying work order number, asset ID, cost center and warehouse and calculate ideal order quantities.



Part Entry

In the **Part Entry** window, you can easily maintain up-to-date inventory records of your supplies. You can also track the costs of parts and supplies that you use during maintenance. By setting a **Reorder Point**, FaciliWorks will notify you when you need to order more parts for your work orders. The **Stock Level Indicator** is a useful visual to inform you of current stock levels.

Part Entry – Information Tab



Part No.: Enter a unique alphanumeric identification code for the part.

Description: Enter a brief description of the part.

Class: Classify parts based on ordering, stocking or job assignment policies.

Category: Categorize parts for ease in grouping for reports and graphs.

Sub Category: Categories can be divided into subcategories for more detailed reporting.

Case Pack: Enter the number of parts a typical package or shipment contains. For example, enter the number of items per case – 12-pack, 24-pack or 96-pack carton.

UPC Code: Enter the UPC code assigned to this part.

Manufacturer: Select the name of the part's manufacturer from the drop-down list.

Manufacturer Part No: Enter the manufacturer's part number. Your printed purchase orders will show this number instead of your internal part number. However, if you leave this field blank, your POs will show your internal part number.

Model No.: Enter the part's model number.

Supplier: Select the supplier from the drop-down list.

Unit of Measure: Enter the unit by which you usually purchase the part, such as each, dozen, carton, 3-pack, 6-pack, gallons, pound, case or gross.

Cost from Manufacturer: Enter the current cost of the part.

Shelf Life: If the part is perishable or will soon be obsolete, enter its shelf life.

Critical: Place a check in this box to indicate that this part is critical.

ABC Stock: ABC Stock items fall into the following categories:

- "A" Items are expensive to keep on hand, but are critical items. You would keep a small number of these on hand and closely manage the stock level.
- "B" Items are not very expensive to keep on hand, but are still required. Keep a moderate amount of parts in stock, but would not closely monitor the stock level.
- "C" Items are inexpensive parts that may not be critical. You would keep a large number of these parts on hand, but would not closely monitor the stock level.

Part User 1 and **Part User 2**: Use these custom fields to track additional information. These fields can be renamed using the **Customize** button.

Last Invoice Date: Enter the last invoice date. Click within the field to activate the calendar icon. Click the calendar icon to select a date or click the grey button to the right of this field to automatically insert today's date.

Last Order Date: Enter the date on which you last ordered the part.

Last PO Number: Reference the PO number for the last order.

Lead Time: Enter the estimated lead time for the part.

Reorder Point: Enter the minimum quantity to have in stock before you reorder this part. When assigning this part to a work order, FaciliWorks will notify you if your part quantity drops to or below the reorder point.

Reorder Quantity: Enter the number of parts to order once the stock level falls to the reorder point. The total quantity to order will be the difference between the quantity in stock and the reorder point, plus this field. (Reorder Point - Quantity in Stock) + Reorder Quantity = Total Quantity to Order

Quantity in Stock: Shows the current inventory level of this part. To change this amount, see **Changing the Quantity in Stock**.

Quantity on Order: Based on purchase order records, this field shows the quantity currently on order. This number can be edited.

On Back Order: Displays the number of parts that are currently on back order (based on your purchase order records). This number can be edited.

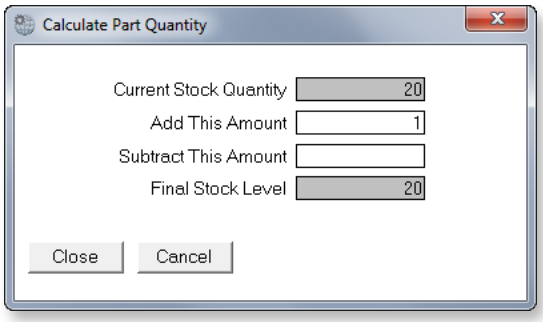
Stock Level: Displays a visual graph of the current quantity in stock.

Create Purchase Order for this Part: When this box is checked and the part quantity falls to the reorder point, FaciliWorks will automatically create a purchase order for the part.

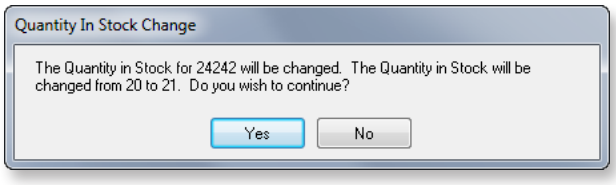
History: Click the **History** button to display both open and completed work orders that use this part.

Changing the Quantity in Stock

If the **Quantity in Stock** must be changed, double-click the field or click the magnifying glass to the right of the field. The **Calculate Part Quantity** window will appear. In the designated fields, enter the number of parts to add or subtract and then tab to the next field. FaciliWorks will calculate the new total and display it in the **Final Stock Level** field. To accept this new amount, click the **Close** button or click the **Cancel** button to revoke the action.

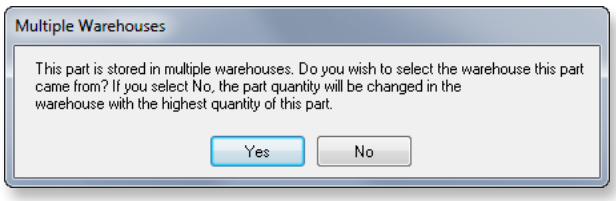


When you click **Close**, the message below will appear, detailing the part number, current amount in stock and the new amount in stock:

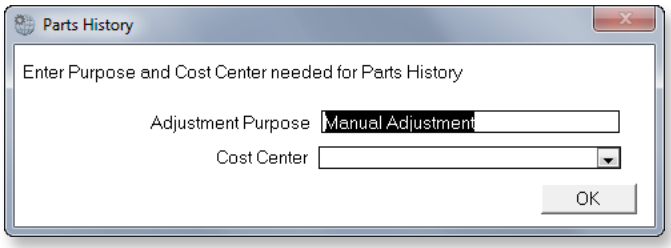

Quantity In Stock Change
The Quantity in Stock for 24242 will be changed. The Quantity in Stock will be changed from 20 to 21. Do you wish to continue?
Yes
No

If you click **No**, the **Quantity in Stock** will remain at the current level and the **Calculate Part Quantity** window will remain open until you close it.

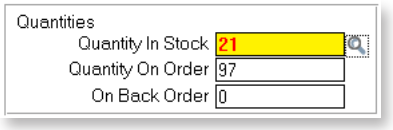
If you click **Yes** to accept the new amount (in the window above), FaciliWorks will update the **Quantity in Stock** field. If the part is stored in multiple warehouses, the following prompt appears:


Multiple Warehouses
This part is stored in multiple warehouses. Do you wish to select the warehouse this part came from? If you select No, the part quantity will be changed in the warehouse with the highest quantity of this part.
Yes
No

Click **Yes** to choose a warehouse. Now, you can enter a purpose and cost center for the stock adjustment:

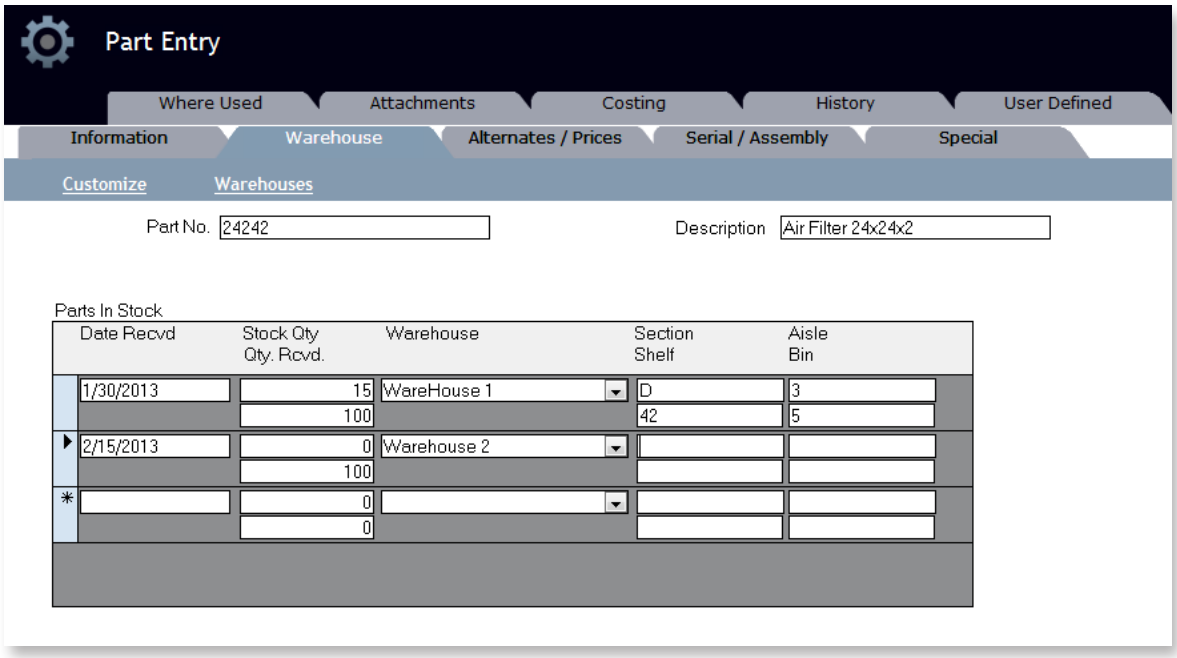


The **Adjustment Purpose** field will show **Manual Adjustment**, but this value can be changed, if needed. Make a selection from the **Cost Center** drop-down list, if desired, and then click **OK**. The newly updated part quantity is now visible in the **Quantity in Stock** field of the **Information** tab:



Part Entry – Warehouse Tab

The **Warehouse** tab tracks the location of all parts in inventory. When parts come in, enter the quantity and storage location information. An inventory report sorted by part number or location can be generated from the **Reports** menu. By selecting one of several options from the **Graphs** menu, you can see this information in graph format.



The **Part No.** and **Description** fields auto-fill with the current record's information.

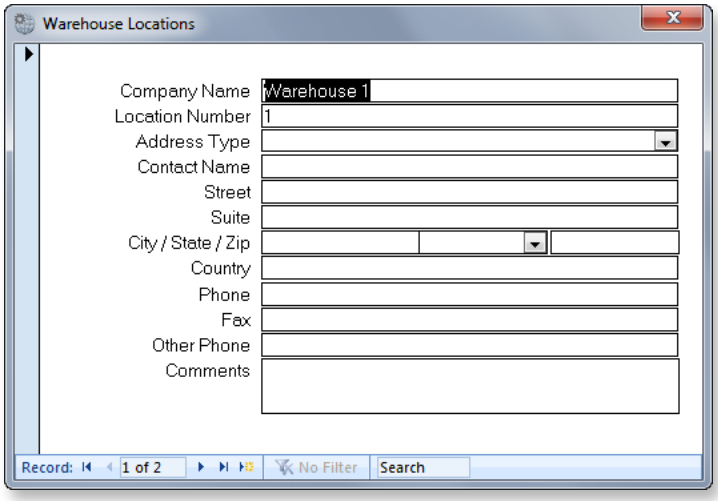
Date Recvd: Enter the date on which you received the order.

Stock Qty: Enter the number of parts already in stock in that particular warehouse. If the sum of all **Stock Qty** fields does not equal the current **Quantity in Stock** (on the **Information** tab), FaciliWorks will open an alert message to inform you.

Qty. Recvd.: Enter the number of parts received for that particular warehouse.

Section/Shelf/Aisle/Bin: Specify the exact storage location of the part.

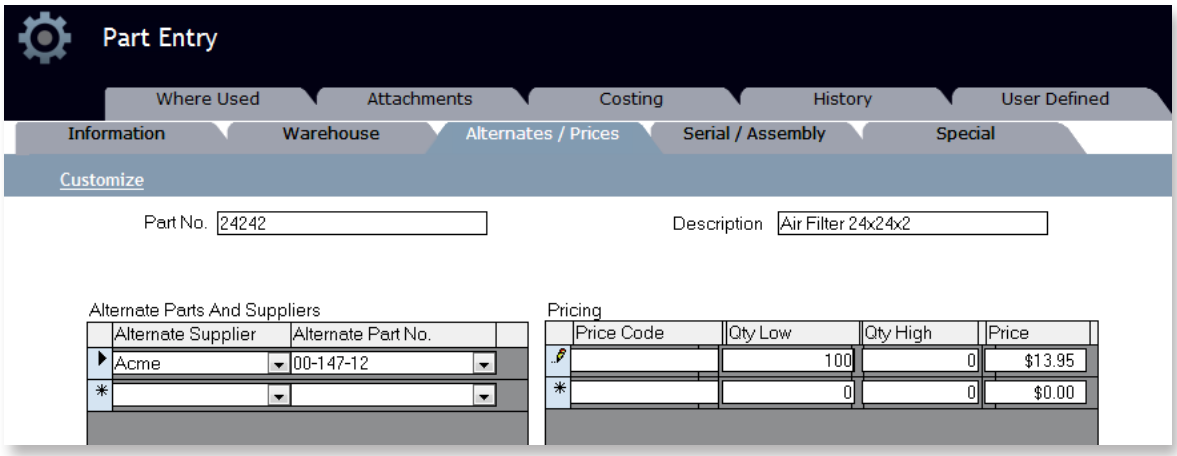
Warehouse field and **Warehouses** button: Select the location for the part in the **Warehouse** field (located in the **Parts in Stock** pane). If the location you need isn't on the list, click the **Warehouses** button (located in the strip beneath the tab title) to add a new warehouse.



To add a new warehouse, click on the **New Blank Record** icon at the bottom of the window. Enter the warehouse information in the appropriate fields and close the window. The new warehouse will now be available for selection in the **Warehouse** field drop-down list.

Part Entry – Alternates/Prices Tab

In the **Alternates/Prices** tab, enter the part number(s) that you can substitute for this part and the supplier(s) of the substitute part(s). In the **Pricing** pane of this form, identify the part pricing by assigning a code to different purchasing options. For example, you might identify a minimum purchase price code. You can also use special codes to identify the lowest price, highest price or optimum quantities for your needs. You could also use the code to reflect a particular product or location number.



Alternate Supplier: Use the drop-down list to select a supplier for the alternate part.

Alternate Part No.: Select a substitute part number from the drop-down list.

Price Code: Enter a price code in this field.

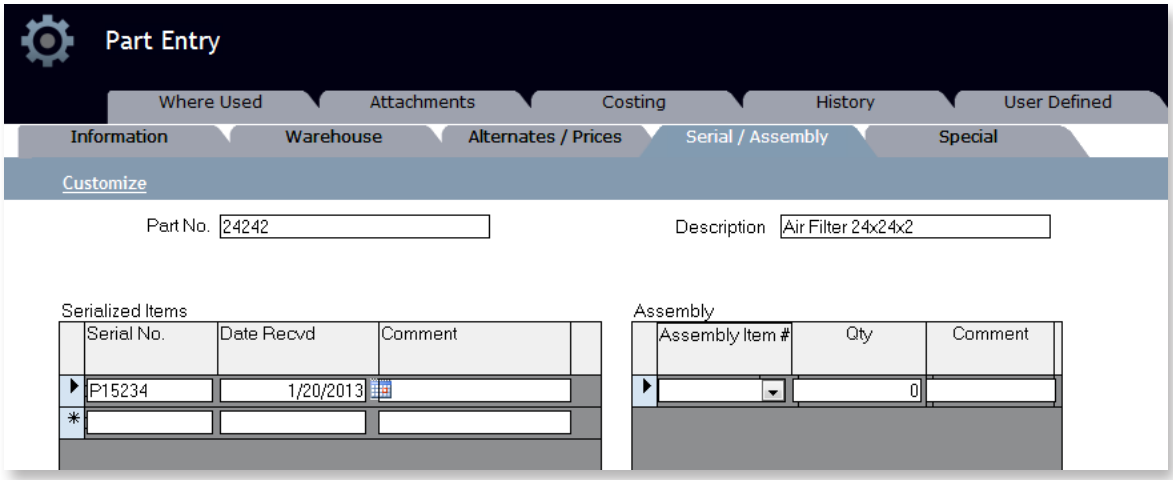
Qty Low: Enter the minimum purchase quantity to qualify for special pricing or discounts.

Qty High: Enter the maximum purchase quantity to qualify for special pricing or discounts.

Price: Enter the price for the quantity specified.

Part Entry – Serial/Assembly Tab

The **Serial/Assembly** tab captures serial number and assembly number information about the part.



Serialized Items Pane

Serial No.: Enter the serial number of the part.

Date Recvd: Enter the date on which you received the part.

Comment: Enter any additional information regarding this particular serial number record.

Assembly Pane

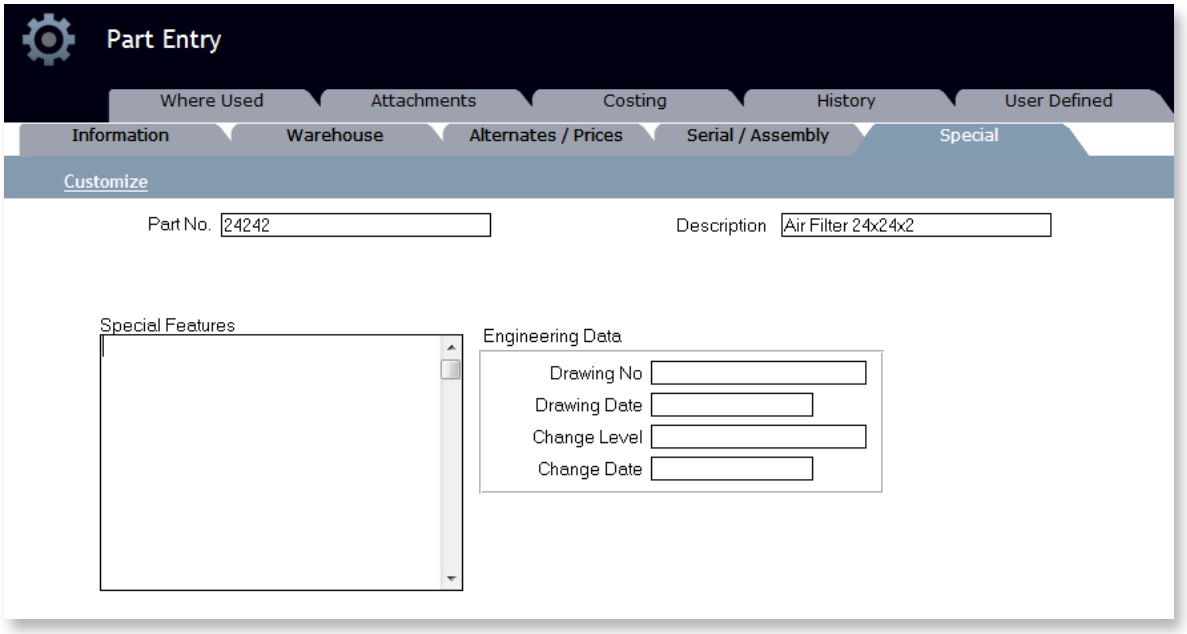
Assembly Item #: Enter the part by assembly number or name.

Qty: Enter the quantity of parts for the assembly item.

Comment: Enter any additional comments about the assembly item or part.

Part Entry – Special Tab

On this tab, you can store special information about the part.



Special Features: Enter any distinctive characteristics of this part.

Drawing No: Enter the drawing number for this part.

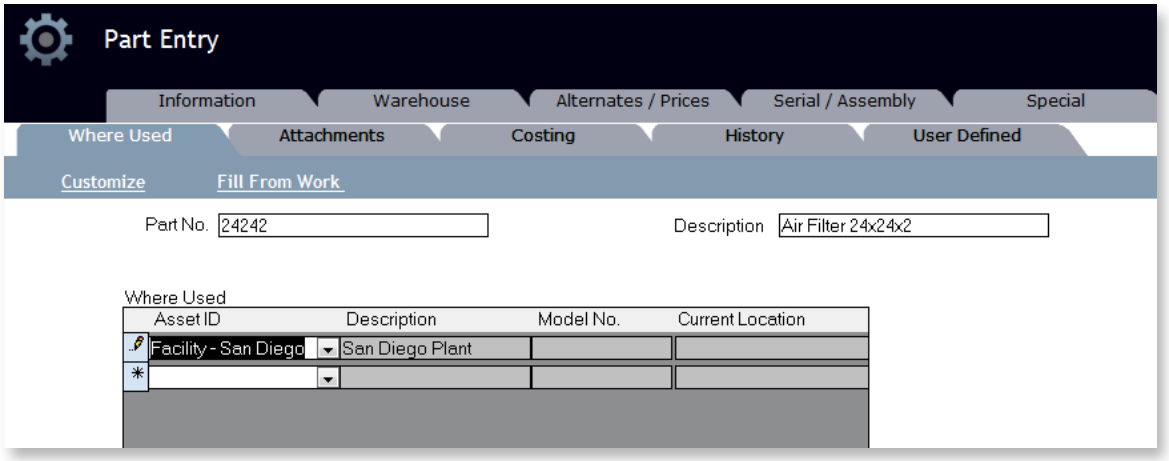
Drawing Date: Enter the date of the original drawing.

Change Level: Enter the current change level characters that identify the current drawing.

Change Date: Enter the date of the most recent drawing change level.

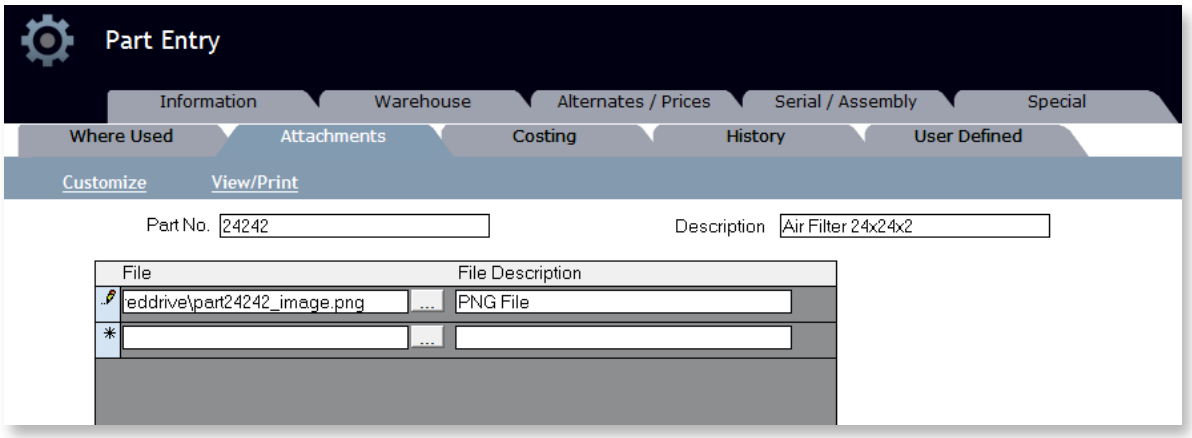
Part Entry – Where Used Tab

On this tab, you can create a list of assets that use this part. When you select an **Asset ID**, the asset's **Description**, **Model Number** and **Current Location** will automatically populate the appropriate fields. You can't change this information on this form. Click the **Fill from Work** button to add assets from completed work orders to this list. This feature is useful if you need to scavenge a part from a non-critical asset and use it until you receive a new part.



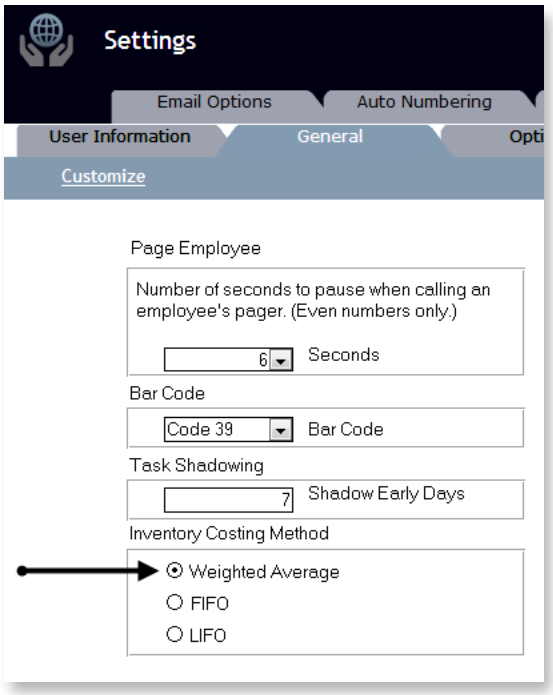
Part Entry – Attachments Tab

Attach pictures, maps, other drawing objects or any other file to a part record on the **Attachments** tab. Type a file path and name into the **File** field or click **[…]** to browse through your directories to find a file. FaciliWorks will automatically enter the type of file in the **File Description** field; this value can be overwritten. There is no limit to the number of files you can attach. To view or print attached files, click the **View/Print** button.

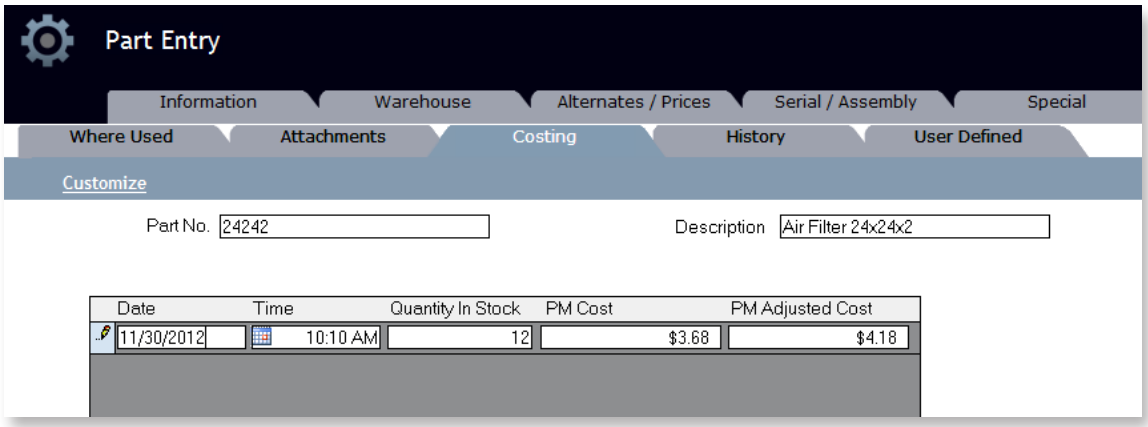


Part Entry – Costing Tab

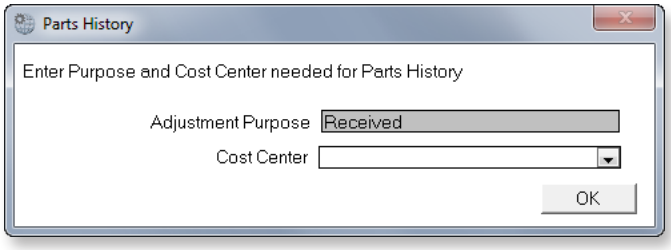
Costing is a record of all of the various cost levels of the part. There will be multiple records here if LIFO or FIFO is used; one record for weighted average. The **Inventory Costing Method** is specified within the **Setup -> Settings -> General** tab:



The **Costing** tab keeps track of the date inventory was received and quantity and cost of each set of parts. If a set of parts comes in at the same cost as the previous set, the quantity is added to the previous set. If the cost is different, then a new record is created with the new cost. If weighted average is used, the new parts are averaged in the existing record. They are weighted by the number of parts already in stock and the number of parts in the new set. Essentially, this is a cost history for all parts.

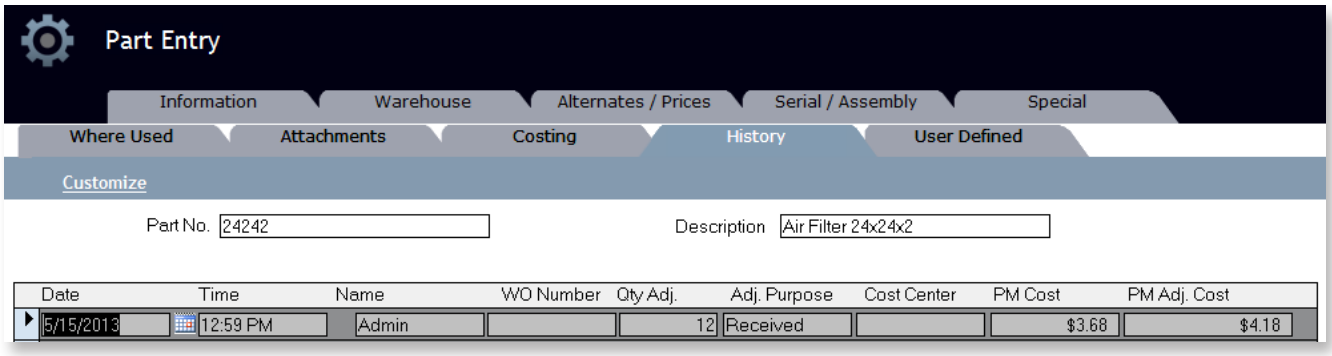


If you make an adjustment to any of the field values in this form, the following window will open, prompting you for an **Adjustment Purpose** and **Cost Center**:



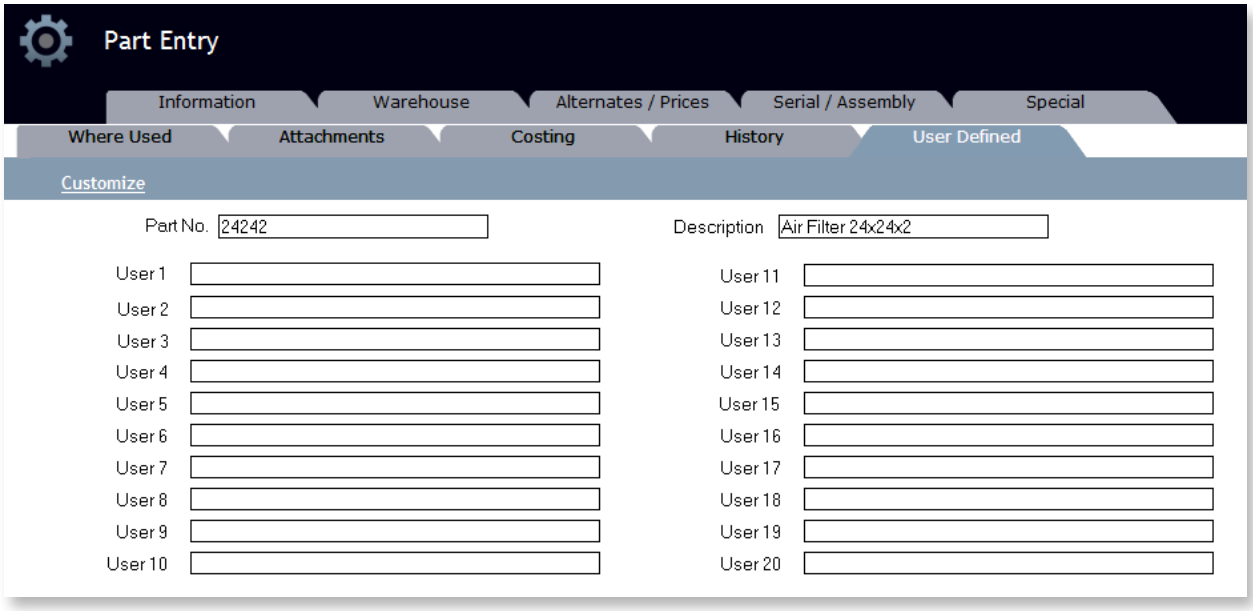
Part Entry – History Tab

This tab displays a record of every change that is made to the inventory level. It may be useful to think of this history information as an audit log that is specific to part quantities only. The difference between this information and the information found when using the **History** button on the **Information** tab is that the information here not only tracks work order data, but also includes any other addition and subtraction of parts. These fields cannot be edited here.



Part Entry – User Defined Tab

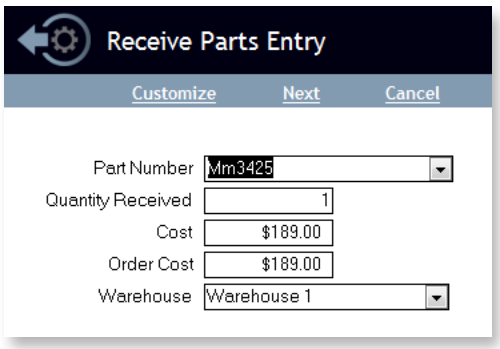
On this form are 20 free fields that can be customized for part tracking information.



The label names can be changed using the **Customize** button (as in all other forms) and the field types can be altered by doing the following: Close the **Part Entry** window to return to the Main Menu. Navigate to the **Setup -> Settings -> Interface -> Parts Custom** sub-tab to define the field type, label text and font weight. Close the record to save the changes. Please see **Chapter Thirteen** for more information about customizing field types.

Receive Parts

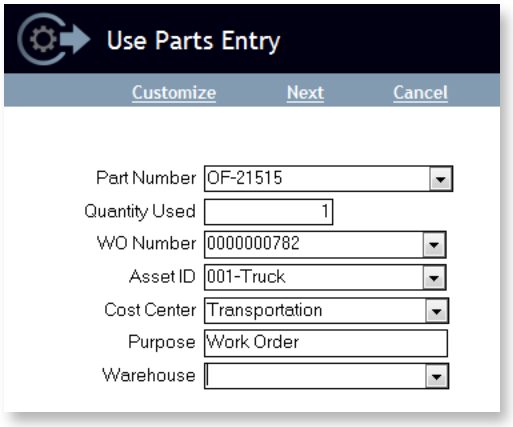
Navigate to **Spare Parts Inventory -> Receive Parts**. Enter received parts on this form to update your part inventory. **NOTE:** Parts received from purchase orders should not be entered here; instead, see **Edit Purchase Orders**.



The warehouse you specify is the storage location for the part received. All labels can be altered using the **Customize** button. To save the record, click **Next**. To cancel the action and return to the **Spare Parts Inventory** menu, click **Cancel**.

Use Parts

After parts are pulled from inventory and used on an asset, you must update your inventory records accordingly. If parts are used for a work order, the parts are automatically deducted from inventory and do not need to be recorded here.

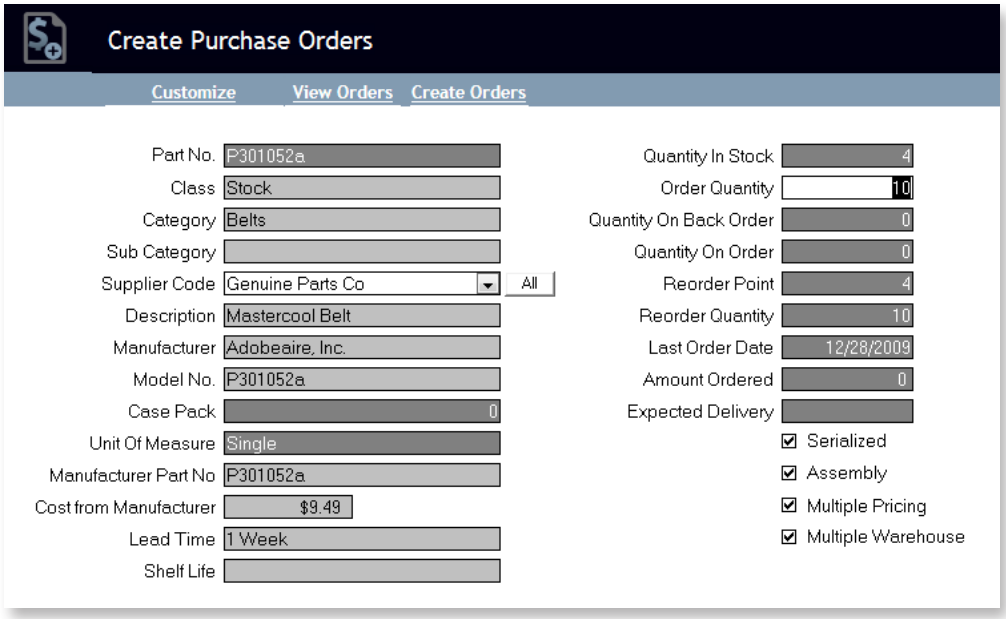


Use this form to enter the **Part Number** and **Quantity Used**, the **Asset ID** for the asset on which the parts were used, the **Cost Center** responsible for the asset, a brief description of the **Purpose** and the **Warehouse** at which the part is currently stored. All labels can be altered using the **Customize** button. To save the record, click **Next**. To cancel the action and return to the **Spare Parts Inventory** menu, click **Cancel**. Using this form will automatically deduct the quantity used from inventory.

Create Purchase Orders

FaciliWorks uses the inventory information stored in its database to automatically notify you that a purchase order is to be created, much the same way a notification is sent for a scheduled work order.

When the **Quantity In Stock** of a part falls to or below the reorder point entered in **Part Entry**, **Create Purchase Orders** is used to quickly create a new purchase order; information from **Part Entry** and **Suppliers** is auto-filled into the fields.

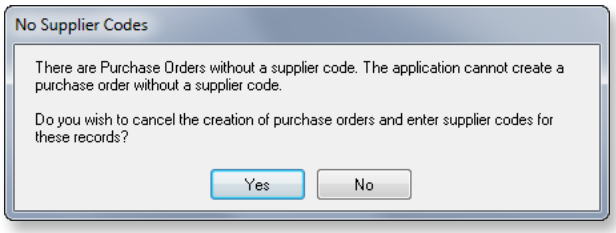


For parts that need to be ordered, a **Create Purchase Orders** form similar to the one above will appear. The grey field values are not editable here.

Use the **Record Navigation Bar** to view all records. All field labels can be altered using the **Customize** button.

For a print preview of current purchase orders to be created, click **View Orders**. To automatically create all pending purchase orders, click **Create Orders**.

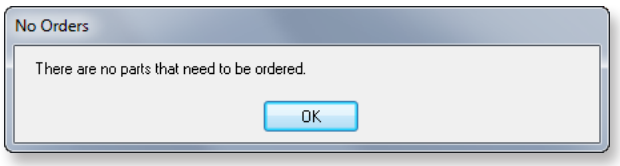
A purchase order cannot be created unless the supplier is known. For parts that do not have the supplier information, FaciliWorks will display this message:


No Supplier Codes
There are Purchase Orders without a supplier code. The application cannot create a purchase order without a supplier code.
Do you wish to cancel the creation of purchase orders and enter supplier codes for these records?
Yes
No

If you click **Yes**, the create action will be cancelled and you will be returned to the **Create Purchase Orders** form. Use the **Supplier Code** drop-down list to select a supplier.

If you click **No** in the above window, FaciliWorks will create all complete purchase orders but will not create any that are missing the **Supplier Code**. The supplier information will need to be filled in before the purchase order can be created.

Note: If all of the parts you have in stock are above their reorder threshold, FaciliWorks will notify you that you have no parts that need to be ordered:



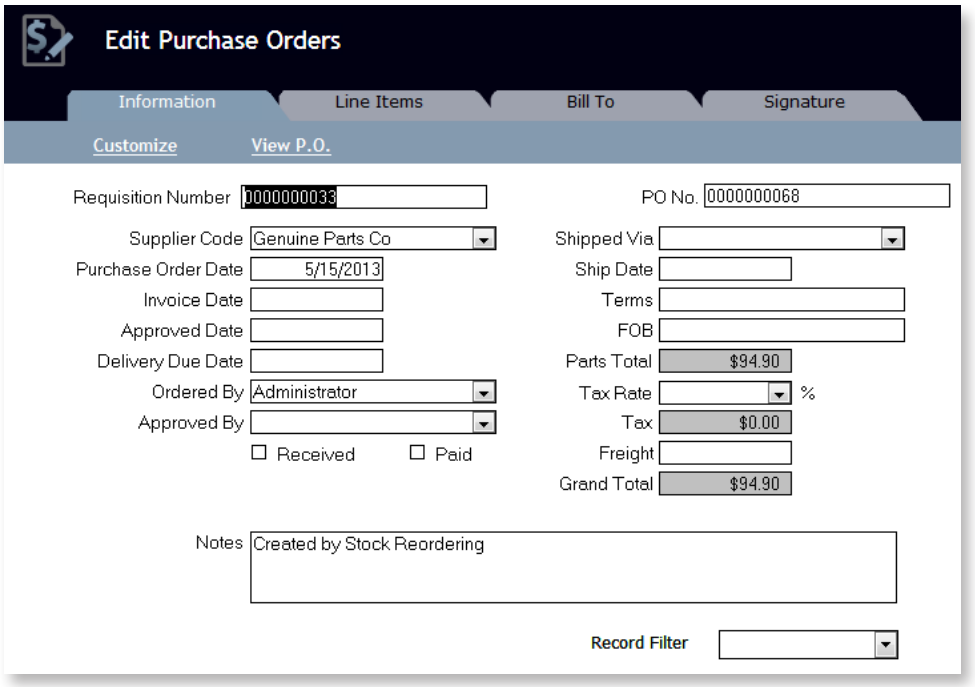
To view pending purchase orders and complete all information, close the **Create Purchase Orders** form and navigate to **Spare Parts Inventory-> Edit Purchase Orders**.

Edit Purchase Orders

Navigate to **Spare Parts Inventory-> Edit Purchase Orders**.

Edit Purchase Orders – Information Tab

This form shows all information required to complete the part order. All field labels on this form can be modified using the **Customize** button.



Requisition Number: FaciliWorks creates the requisition number for you. The format for this number is based on the format specified in the **Setup -> Settings -> Auto Numbering** tab.

PO Number: FaciliWorks auto-creates the purchase order number based on the purchase order number format specified in the **Setup -> Settings -> Auto Numbering** tab.

Supplier Code: Select or enter or the code of the supplier.

Purchase Order Date: This field contains the date on which the purchase order was created.

Invoice Date: Enter the invoice date for this order.

Approved Date: Enter the date on which the purchase order was approved.

Delivery Due Date: Enter the anticipated delivery date, if known.

Ordered By: If this field does not auto-fill, select or enter the name of the person, department or location that requires the items on this order.

Approved By: Enter or select the name of the person who approved the purchase order.

Received: Check this checkbox when the order is received.

Paid: Check this checkbox when your accounting department pays the invoice for the order.

Notes: Enter any notes that should appear on the purchase order. If the order was created as a result of reorder point levels, the **Notes** field will auto-fill to reflect this.

Shipped Via: Enter or select the shipping method.

Ship Date: Enter the date on which the supplier shipped the order.

Terms: Enter the payment terms for the order.

FOB: Enter the party responsible for paying for loading and transportation costs, and/or the point at which the responsibility for the goods transfers from shipper to buyer.

Parts Total: This field contains the total cost of the order as calculated by FaciliWorks. You cannot edit this field.

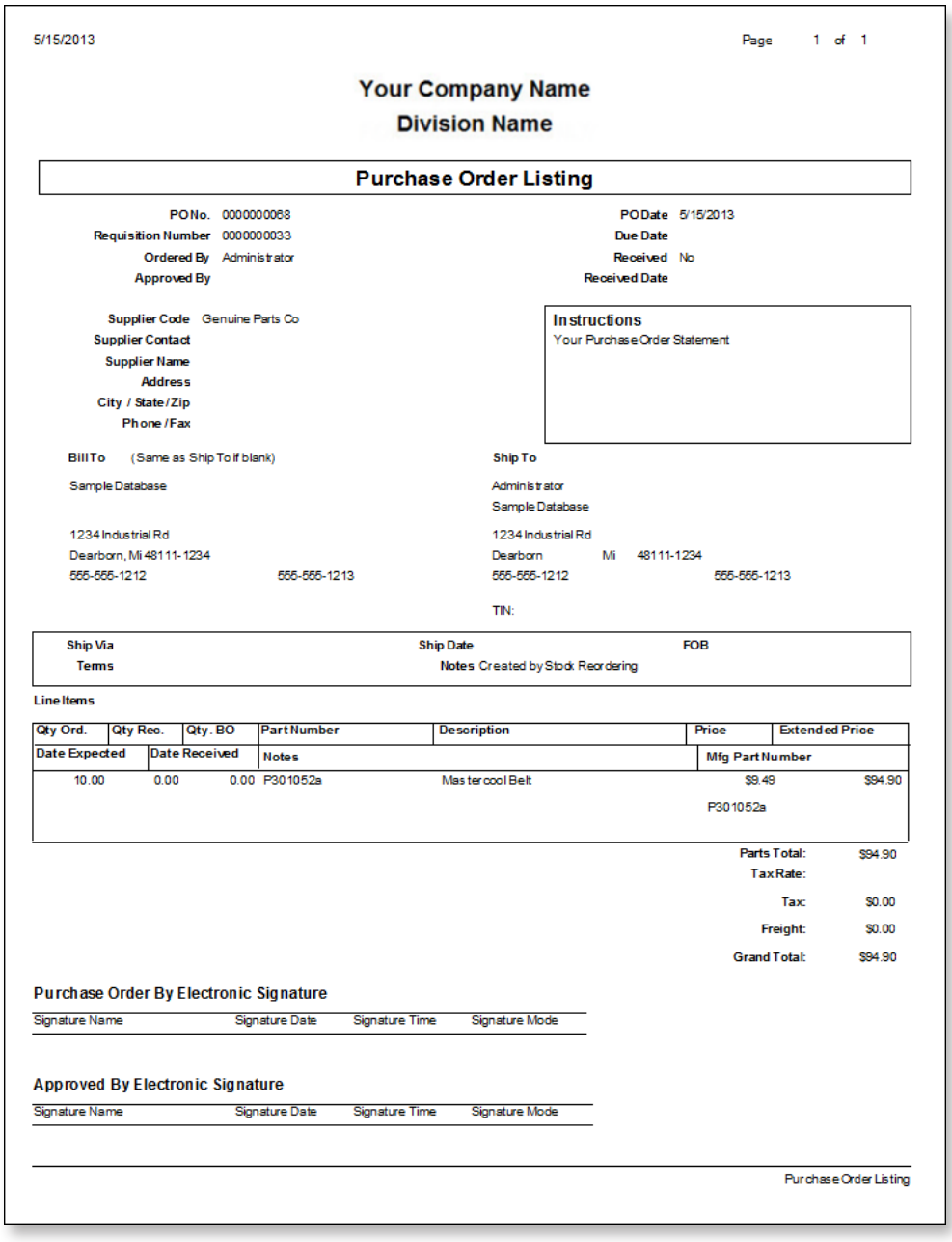
Tax Rate: Enter or select the tax rate.

Tax: This field contains the tax amount on this order as calculated by FaciliWorks based on the **Parts Total** and **Tax Rate**. You cannot edit this field.

Freight: Enter any freight costs included with the order.

Grand Total: This field contains the total cost, including freight and tax. You cannot edit this field.

To preview the **Purchase Order Listing** report of the active purchase order, click the **View P.O.** button.



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Your Company Name
Division Name

Purchase Order Listing

PO No. 0000000068
Requisition Number 0000000033
Ordered By Administrator
Approved By

PO Date 5/15/2013
Due Date
Received No
Received Date

Supplier Code Genuine Parts Co
Supplier Contact
Supplier Name
Address
City / State / Zip
Phone / Fax

Instructions
Your Purchase Order Statement

Bill To (Same as Ship To if blank)
Sample Database
1234 Industrial Rd
Dearborn, Mi 48111-1234
555-555-1212 555-555-1213

Ship To
Administrator
Sample Database
1234 Industrial Rd
Dearborn Mi 48111-1234
555-555-1212 555-555-1213

TIN:

Ship Via
Terms
Ship Date
Notes Created by Stock Reordering
FOB

Line Items

Qty Ord.	Qty Rec.	Qty. BO	Part Number	Description	Price	Extended Price
Date Expected	Date Received		Notes		Mfg Part Number	
10.00	0.00	0.00	P301052a	Mastercool Belt	$9.49	$94.90
					P301052a	

Parts Total: $94.90
Tax Rate:
Tax: $0.00
Freight: $0.00
Grand Total: $94.90

Purchase Order By Electronic Signature

Signature Name	Signature Date	Signature Time	Signature Mode

Approved By Electronic Signature

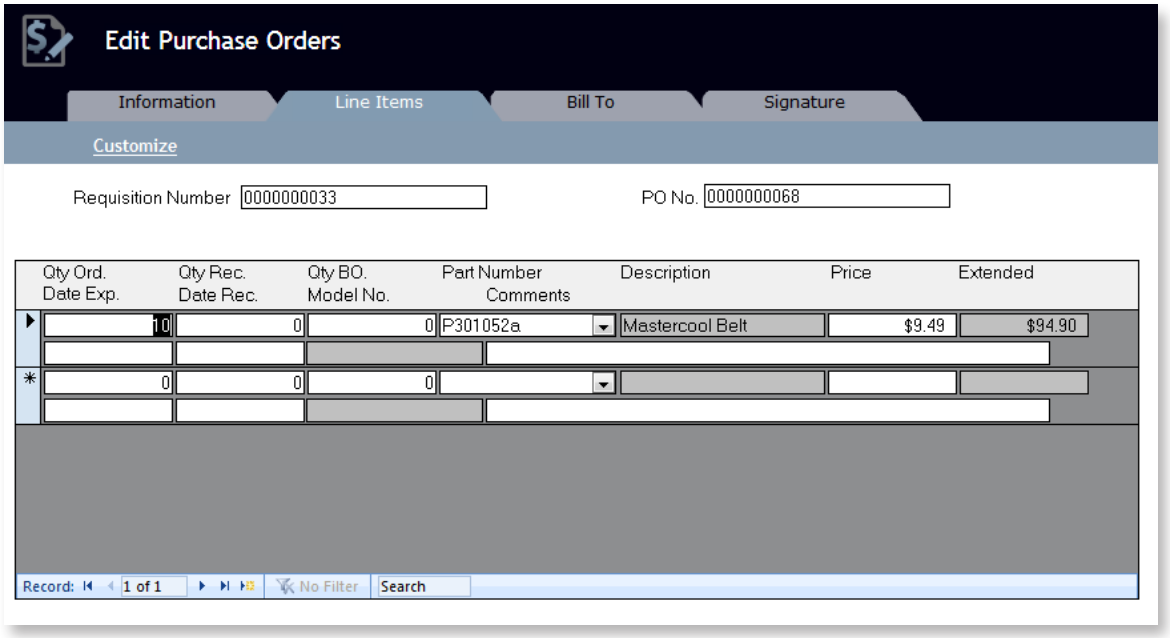
Signature Name	Signature Date	Signature Time	Signature Mode

Purchase Order Listing

The information that appears in the **Instructions** box of the report is created and modified in the **Purchase Order Statement** pane of the **Setup -> Settings -> User Information** tab.

Edit Purchase Orders – Line Items Tab

When FaciliWorks creates purchase orders, all parts from the same supplier will be grouped into one order. If any other parts are needed from the same supplier, they can be added to the order in the **Line Items** form. As you use the drop-down list in the **Part Number** field, the **Description** and **Price** will auto-fill from the database. When you enter part quantity ordered, the **Extended** field will calculate total cost for the part.



Qty Ord.: Enter the quantity ordered for each part.

Qty Rec.: Enter the quantity received for each part.

Qty BO: Enter the quantity of parts that are on back order.

Part Number: Select the part number(s) you need to order (only parts already entered in the **Part Entry** form will appear on this list).

Description: The part description auto-fills when you select the part number.

Price: The part's price per unit will auto-fill this field. This field is editable.

Extended: This field contains the cost for the number of parts your ordered (**Quantity Ordered** x **Price**).

Date Exp.: Enter the date on which you expect to receive this order.

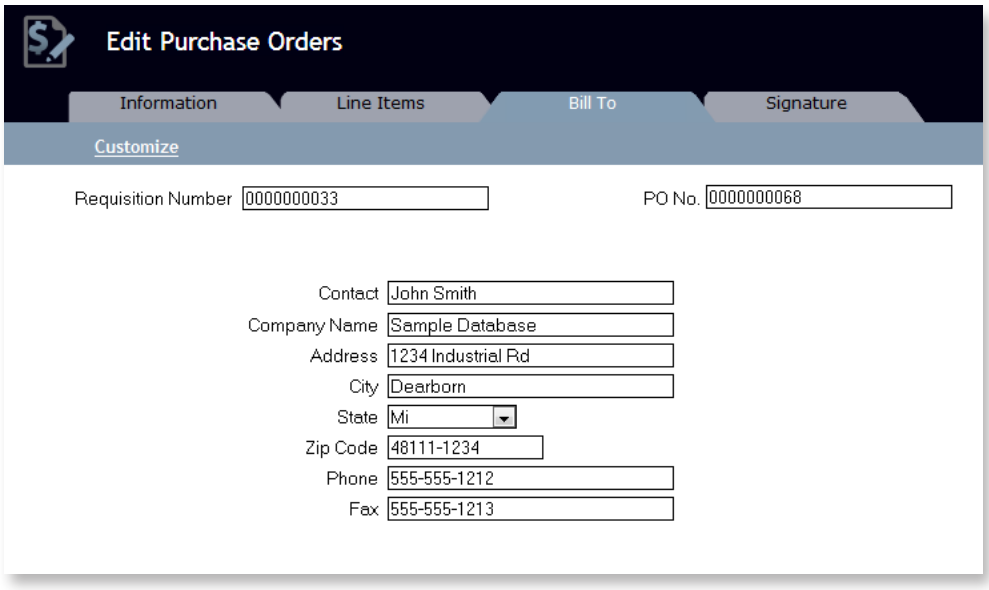
Date Rec.: When you receive the shipment, enter the date in this field.

Model No.: Enter the model number of the part.

Comments: Enter any additional comments regarding this item.

Edit Purchase Orders – Bill To Tab

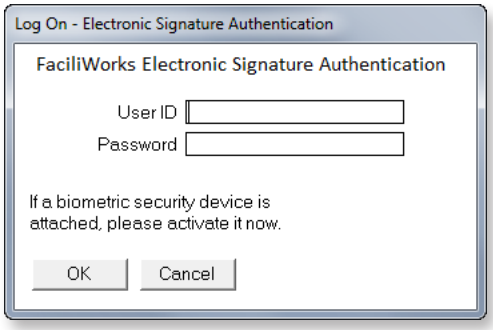
The information on the **Bill To** form is auto-filled with data from the **Setup -> Settings -> User Information** tab, but can be changed as necessary for each purchase order.



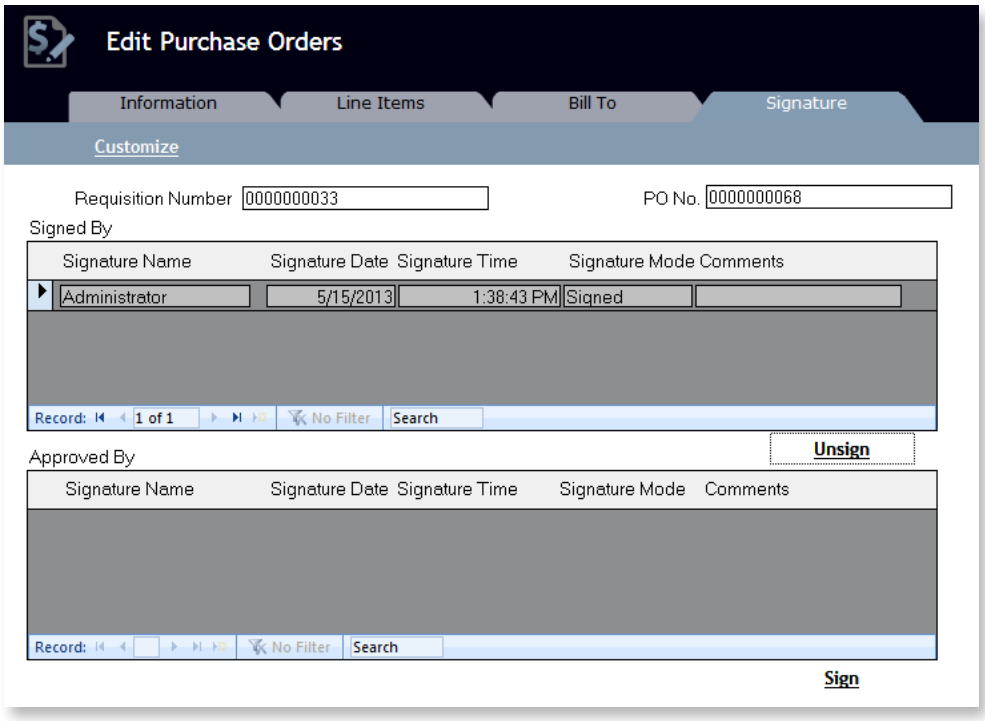
Edit Purchase Orders – Signature Tab

To use the signature feature, you must first activate security by checking the checkbox labeled **Enable Security** in the **Setup -> Settings -> Security** tab.

To sign a record as completed, click the **Sign** button under the **Signed By** pane and the following window will open:



Enter your user ID and password and then click **OK**. This creates a new signature record containing the user's name, the date and the exact time. (The label of the **Sign** button changes to **Unsign** at this time.)



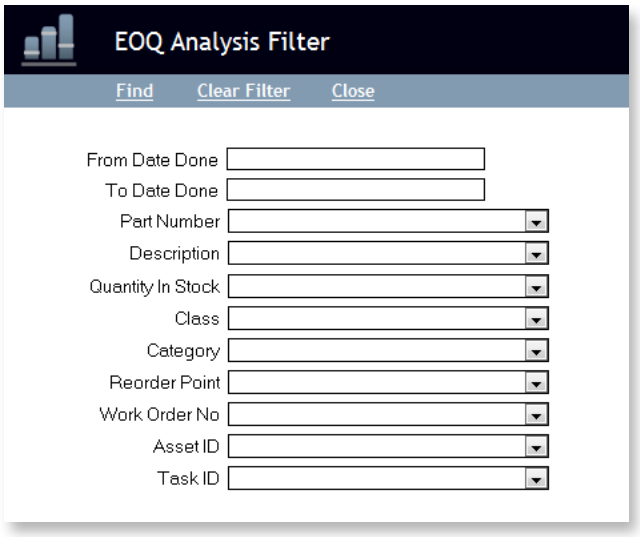
Once the **Signed By** pane has been marked as signed, the **Approved By** pane can be marked as signed. Once a record has been signed, it cannot be edited by anyone. A signed record can only be made editable if the original signer unsigns it; if the record's approval has been signed, the approval must be unsigned by the person who signed it before the record can be unsigned.

Note: You can require users to enter their user IDs and passwords whenever they click the **Sign** or **Unsign** buttons by checking the checkbox labeled **Electronic Signature Login** in **Setup -> Settings -> Security** tab. If this option is not enabled, FaciliWorks will sign the record with the user name of the user who is currently logged in.

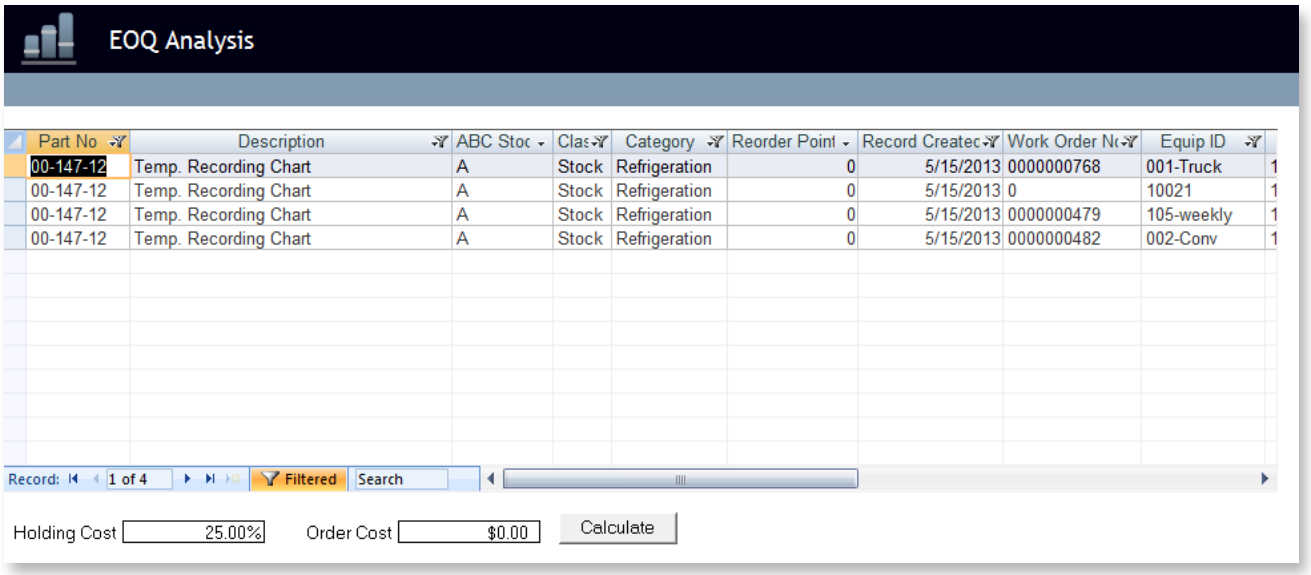
EOQ Analysis

From the Main Menu, select **Spare Parts Inventory** and then click **EOQ Analysis**. Economic Order Quantity (EOQ) is a formula that helps you optimize stock levels by determining the stock level that will cost your company the least amount of money. EOQ uses the number of parts that are needed for a specified time period and compares that to the cost of ordering the parts and the cost of keeping the parts on the shelf.

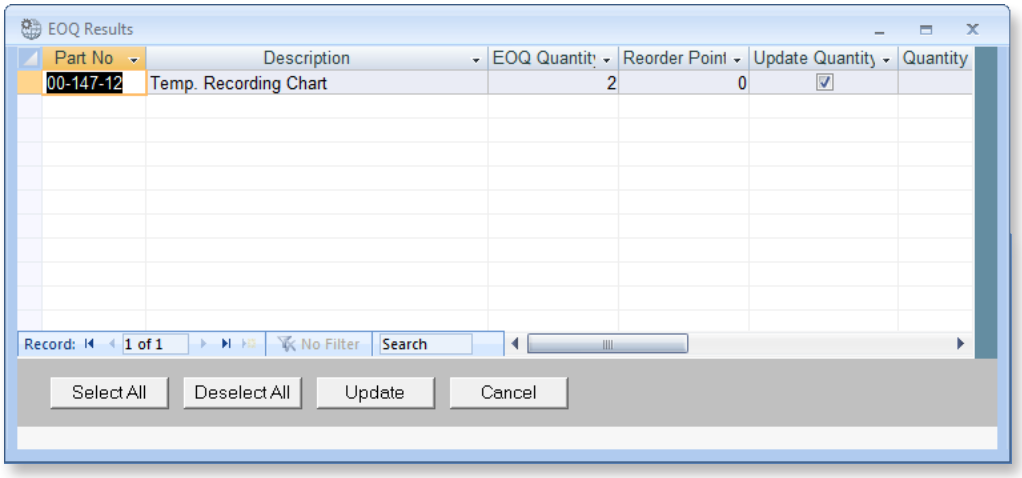
The **EOQ Analysis Filter** is used to determine which parts are compared.



Click the **Find** button to view information based on the criteria selected in the filter or leave the filter blank to display all data. **Clear Filter** sets all fields blank. Click **Close** to return to the **Spare Parts Inventory** menu.



The **EOQ Analysis** window shows a list of parts to be compared. **Holding Cost** refers to the costs to keep a part on the shelf as a percentage of the part's purchase cost. **Order Cost** refers to the miscellaneous costs associated with buying parts, including the time it takes to create the order, shipping costs or any costs other than the parts themselves and the taxes. These two values are the same for every part in the list. Click the **Calculate** button; FaciliWorks will recalculate reorder points based on the figures you enter.



The **EOQ Results** window displays the current **Reorder Point** and the calculated **EOQ Quantity** reorder point for each part in the list. To use the calculated reorder point for future orders of a particular item, select that item by checking the item's **Update Quantity** checkbox and then click the **Update** button. To close this window without modifying your database, click **Cancel**.

Chapter Nine:
Personnel

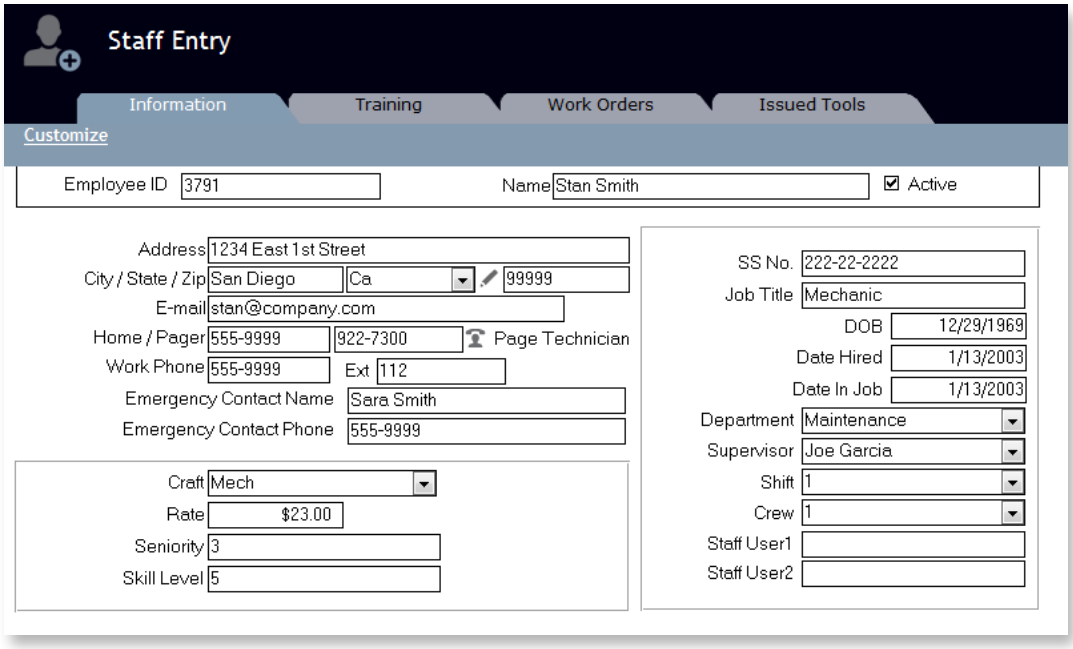
The **Personnel** menu is used to enter detailed staff and user records and assign security permissions. Employee training information, assigned work orders and issued tools are all tracked here as well.

Staff Entry

From the Main Menu, click **Personnel** and then select **Staff Entry**. In the **Staff Entry** window, enter and view detailed employee records for your maintenance staff, including training information, assigned work orders and tools issued to each employee.

Staff Entry – Information Tab

The **Information** tab captures the personal profile of each employee. To add a new employee, click the **New Blank Record** button on the **Record Navigation Bar** in the lower left corner of the form. Data entered here will display in **Labor** drop-down lists for maintenance, in the **Requested By** field in service requests and in email notifications. The **Active** checkbox is checked when the employee is in good standing. If the employee is no longer with the company, uncheck the **Active** box rather than delete the employee record. If you delete the employee record, all associated records, such as work order history will also be deleted.



The fields on the left side of the form are typically completed. You may want to remove sensitive information, such as **SS No.** from the right side of the form or restrict use. For setting security permissions, please see the **Security** section of **Chapter Nine**.

Employee ID: Create a unique alphanumeric identifier.

Name: Enter the employee's full name.

Active: By default, this checkbox is checked. If it is not checked, the employee will not appear on reports or in drop-down lists. Rather than delete an employee, uncheck this checkbox to make the employee inactive to retain all associated records.

Email: Enter the employee's email address; this is necessary if you are going to use the **Automatic Email** feature.

Craft: Categorize workers by profession such as a description, code or number classification.

Rate: Enter the employee's hourly rate. FaciliWorks uses this rate to calculate the cost of maintenance based on actual hours performed.

Seniority: Enter the work status of the employee or the date that determines seniority.

Skill Level: An internal or external classification system can be used to assign skill level.

Staff User 1 and **Staff User 2**: Used to store any additional information. The field labels can be customized.

Craft: Categorize your workers by profession. You can use a description, such as welder or electrical engineer, a code such as MIG-3 or a union number combined with a classification, such as 786-Journeyman or 786-Apprentice.

SS No.: Enter the employee's social security number or other employee number.

Job Title: Enter the employee's official job title.

DOB: Enter the employee's date of birth.

Date Hired and **Date in Job**: Enter the date(s) on which you hired the employee and when the employee started his or her current position.

Department: Enter the name of the employee's primary department.

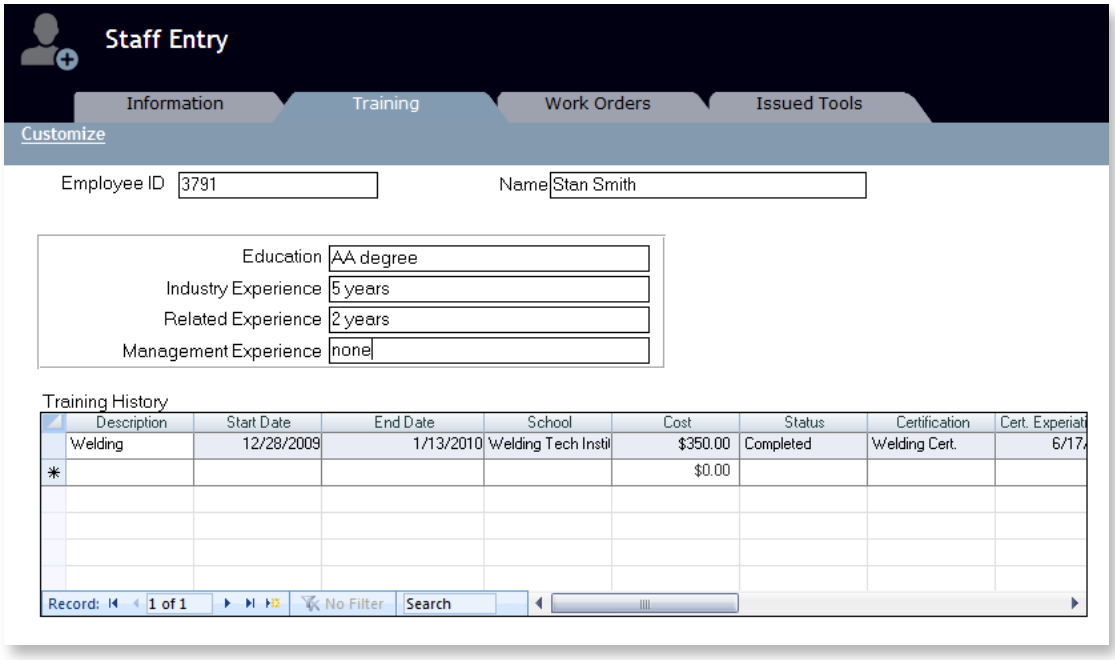
Supervisor: Enter the name of the employee's direct supervisor.

Shift: Indicate the shift(s) for which this employee is available.

Crew: Enter the name(s) of the crew(s) to which this employee either belongs or is qualified to belong.

Staff Entry – Training Tab

Use the **Staff Entry -> Training** tab to keep track of the employee's current and continuing education.



Education: Enter a basic description of the employee's education.

Industry Experience: Enter the employee's experience, for example, "6 years Boiler Engineer, Class II."

Related Experience: Use this field to track any other useful experience, such as "4 years Mechanical Drafting – 3-dimensional blueprints."

Management Experience: Enter any management experience that the employee has - for example, "Supervised crew of 18 for installation of 3 cooling towers in 1996."

Use the **Training History** pane to track classes or certifications for each employee. Use the scroll bar at the bottom of the form to see the different fields.

Description: Enter a brief description of the training.

Start Date and **End Date**: Enter the beginning and ending dates of the training.

School: Enter the name of the school at which the employee attended training.

Cost: Enter the cost of the class.

Status: Indicate whether or not the employee has finished this particular class.

Certification: If this training was for a particular certification, enter the type of certificate earned.

Cert. Expiration Date: If the certification is good for a specified length of time, enter the expiration date in this field.

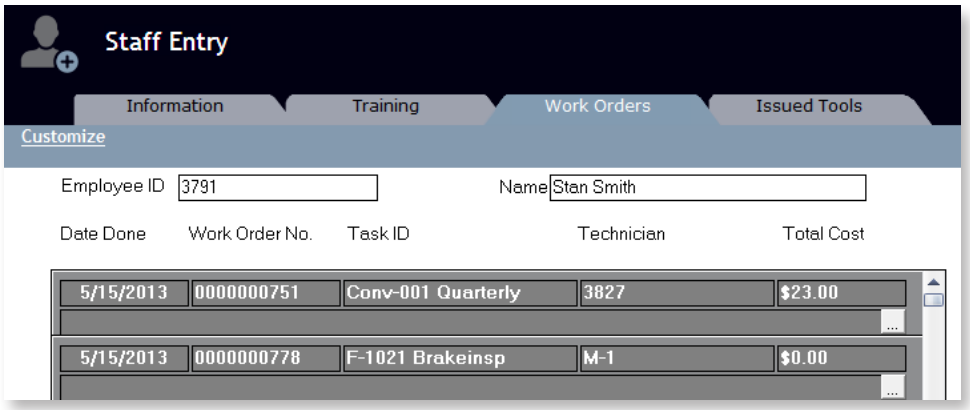
Hours: Enter the number of hours of the training session.

CEUs (Continuing Education Units): Enter the number of credit units earned for the training.

Comments: Enter any other relevant information for this training or certification.

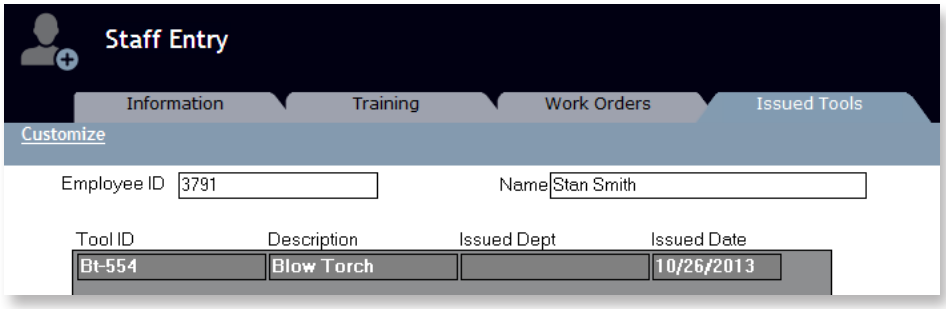
Staff Entry – Work Orders Tab

The **Work Orders** tab displays work orders assigned to and completed by the employee. **Date Done**, **Work Order No.**, **Task ID** completed, **Technician** supervising the work and **Total Cost** are all reported here. FaciliWorks automatically collects this information from your work order records. You can view this information here, but it cannot be edited here.



Staff Entry – Issued Tools Tab

The **Issued Tools** tab displays all tools that have been issued to the employee to complete tasks. This information is not editable here.

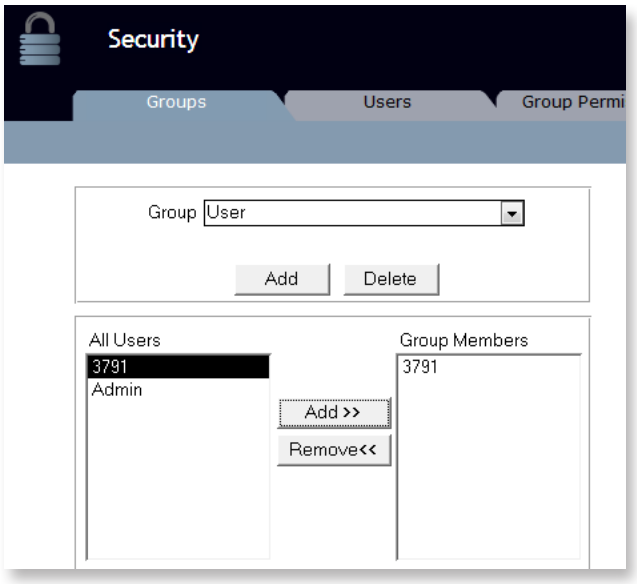


Security

FaciliWorks offers you several system security options, including logon options (in the **Setup -> Settings -> Security** tab) and program access options. You can assign users to pre-defined user groups, which saves the time you would spend assigning individual permissions. You can also create a new group based on a pre-defined group and make modifications as necessary. Navigate to **Personnel -> Security**.

Security – Groups Tab

Use the **Groups** tab to create and edit names of different security groups and add users to a security group. FaciliWorks includes five pre-defined groups: Administrator, Guest, Requests, User and Work Orders. Each group contains a set of security permissions (defined under the **Group Permissions** tab) which can be customized to your needs.



New groups can be added to accommodate special needs. To add a new group, type the group's name in the **Group** field, and then click the **Add** button. FaciliWorks prompts you to copy group permissions from another group. Click **Yes** to copy the rights (you would then be prompted to select a group from which to copy permissions and prompted to copy users from another group) or click **No** to assign unique permissions to this group. To delete a group, select the name from the **Group** field drop-down list and then click the **Delete** button.

The **All Users** pane contains a list of users entered into the program through the **Users** tab. To add users to a group, select the group using the **Group** drop-down list. Select a user from the **All Users** pane, then click the **Add>>** button. The **Group Members** pane contains a list of all users who are assigned to that security group. Select the user from the **Group Members** pane and then click the **Remove<<** button to delete a user from a security group.

Each group and its permissions are listed in the following tables. If a program area isn't listed for a particular group, the group does not have any rights to that area.

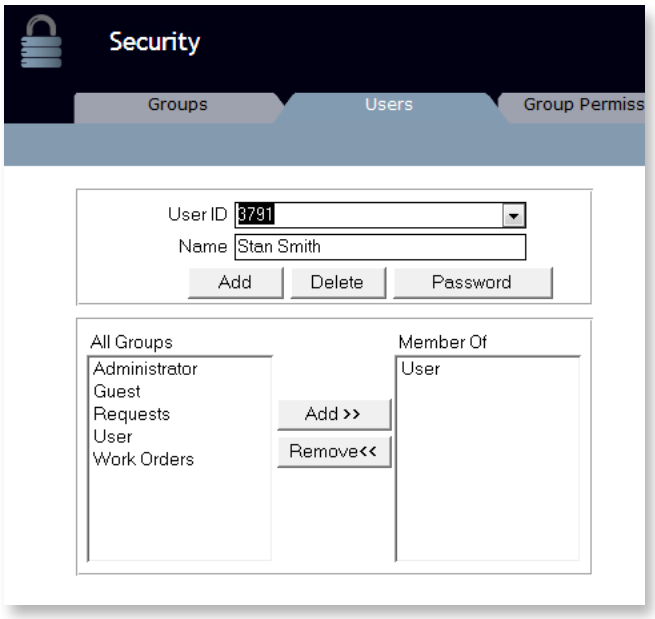
Program Area	Permissions by Group				
	Administrator	User	Work Orders	Guest	Requests
Approve Service Request Entry	Edit/Add/ Delete				Edit/Add/ Delete
Asset Analysis	Print	Print		Print	
Asset Bar Code Labels	Print	Print	Print	Print	
Asset Detail Report	Print	Print	Print	Print	
Asset Entry	Edit/Add/ Delete	Edit/Add	Read Only	Read Only	
Asset Issue/Usage	Edit/Add/ Delete	Edit/Add		Read Only	
Asset Listing	Print	Print	Print	Print	
Asset Location	Print	Print	Print	Print	
Asset Status Entry	Edit/Add/ Delete	Edit/Add	Read Only	Read Only	Read Only
Asset Status Report	Print	Print		Print	
Asset Task Records		Edit/Add	Read Only	Read Only	
Asset Usage History	Print	Print		Print	
Budget Entry	Edit/Add/ Delete				
Calculate Due Dates and Meters	Run				
Calendar	Edit/Add/ Delete	Edit/Add	Read Only	Read Only	Read Only
Contract Entry	Edit/Add/ Delete	Edit/Add		Read Only	
Contract Listing	Edit/Add/ Delete	Print		Print	
Create Purchase Orders	Edit/Add/ Delete	Edit/Add			
Create Service Requests	Edit/Add/ Delete	Edit/Add			Add Only
Critical Part Listing	Print	Print	Print		
Data Backup	Edit/Add/ Delete				
Edit Purchase Orders	Edit/Add/ Delete	Edit/Add		Read Only	
Edit Service Requests	Edit/Add/ Delete	Edit/Add	Edit/Add	Read Only	Read Only
Edit Tool Issue and Return Records	Edit/Add/ Delete	Edit/Add		Read Only	
Edit Work Orders	Edit/Add/ Delete	Edit/Add	Edit/Add	Read Only	Read Only
Fill Maintenance Dates	Run				
Fill Part and Tools Use	Run				
Find Uncodeable Records	Run	Run	Run		
Import/Export Records	Edit/Add/ Delete				
Issue Tools	Edit/Add/ Delete	Edit/Add	Edit/Add		

Program Area	Permissions by Group				
	Administrator	User	Work Orders	Guest	Requests
Maintenance Cost by Cause	Print	Print		Print	
Manual Create Scheduled Work Orders	Edit/Add/ Delete	Edit/Add	Edit/Add		
Modify License	Run				
Multiple Choice Entry	Edit/Add/ Delete				
Out of Limit Variables	Print	Print	Print	Print	
Part Barcode Labels	Print	Print	Print	Print	
Part Consumption Listing	Print	Print	Print	Print	
Part Entry	Edit/Add/ Delete	Edit/Add		Read Only	
Part Listing	Print	Print	Print	Print	
Part Listing – Low/Out of Stock	Print	Print	Print	Print	
Part Reorder Calculation	Print	Print	Print		
PM Sign-in Sheet/Audit Cards	Print				
Print Blank Entry Forms	Print	Print			
Procedure Entry	Edit/Add/ Delete	Edit/Add		Read Only	
Procedure Listing	Print	Print		Print	
Purchase Order Listing	Print	Print		Print	
Records Archive	Edit/Add/ Delete				
Remove Spaces	Run				
Repair Work Orders Dates	Run				
Report Control Entry	Edit/Add/ Delete				
Report Control Listings	Print	Print		Print	
Report Queue	Print	Print	Print		
Request Work Orders Summary	Print	Print	Print	Print	Print
Reset Open Tasks	Run		Run		
Return Tools	Edit/Add/ Delete	Edit/Add	Edit/Add		
Schedule	Edit/Add/ Delete	Edit/Add	Read Only	Read Only	Read Only
Security	Edit/Add/ Delete				
Service Request Letter Entry	Edit/Add/ Delete				
Service Request Work Orders	Print	Print	Print	Print	Print
Service Requests	Print	Print	Print	Print	Print
Service Requests by Requester	Print	Print	Print	Print	Print
Settings	Edit/Add/ Delete				
Staff Certificate Due Listing	Print				
Staff Entry	Edit/Add/ Delete	Edit/Add			

Program Area	Permissions by Group				
	Administrator	User	Work Orders	Guest	Requests
Staff Labor Performance	Print				
Staff Listing	Print				
Supplier Entry	Edit/Add/ Delete	Edit/Add		Read Only	
Supplier Listing	Print	Print		Print	
Task Entry	Edit/Add/ Delete	Edit/Add	Read Only	Read Only	
Task Listing	Print	Print	Print	Print	
Tool Bar Code Labels	Print	Print	Print	Print	
Tool Entry	Edit/Add/ Delete	Edit/Add		Read Only	
Tool Issue History	Print	Print	Print	Print	
Tool Listing	Print	Print	Print	Print	
Update Task Link	Edit/Add/ Delete	Edit/Add			
Variable Entry	Edit/Add/ Delete	Edit/Add		Read Only	
Variable History Report	Print	Print	Print	Print	
Variable Listing	Print	Print	Print	Print	
Warranty Due Listing	Print	Print	Print	Print	
Work Order	Print	Print	Print	Print	
Work Order Backlog Report	Print	Print	Print	Print	
Work Order Cause Entry	Edit/Add/ Delete				
Work Order Compare	Print	Print	Print	Print	
Work Order Cost Analysis	Print	Print		Print	
Work Order Costs & Labor	Print	Print		Print	
Work Order Due Listing	Print	Print	Print	Print	
Work Order History	Print	Print		Print	
Work Order Labels	Print	Print	Print	Print	
Work Order On Time Analysis	Print	Print		Print	
Work Order Schedule	Print	Print	Print	Print	
Work Order Status	Edit/Add/ Delete	Edit/Add	Read Only	Read Only	Read Only
Work Orders by Location	Print	Print	Print	Print	

Security – Users Tab

The **Users** tab is used to create, edit and delete FaciliWorks user records. You can also assign users to security groups. It is important to understand the difference between staff members and users. A staff member is an employee whose work progress you track and whose information is stored. The techs completing the work orders would be included in this classification. For example, the staff member's salary information is used to calculate labor cost for preventative maintenance. A user, on the other hand, may or may not be included in your staff records. For example, employees outside the facilities/ maintenance group may be users of the system, but will not be tracked as staff members in your database.



Creating a New User

To create a new user, type the **User ID** and the **Name** of the user in the corresponding fields and then click the **Add** button below the **Name** field. To enter a password for the user, click the **Password** button; the **Change Password** entry window will appear. If you do not enter a password, FaciliWorks will require the user to enter a password when he or she first logs into FaciliWorks.

If a user forgets his/her password, the administrator can reset the password by selecting the user's **User ID** from the drop-down list and then clicking the **Password** button and entering the user's new password.

Assigning a User to a Security Group

In the lower section of the form is a list of user groups. Highlight the group(s) to which the user will belong and then click the **Add>>** button to assign the user to the group(s). The list of groups to which the user belongs is shown in the **Member Of** pane. You must assign each user to at least one group.

Note: The user receives the highest level of privileges available among the groups to which he or she is assigned. For example, if the user is assigned to one group that cannot delete tool records, but is also assigned to a group that can delete tool records, the user will have permission to delete tool records.

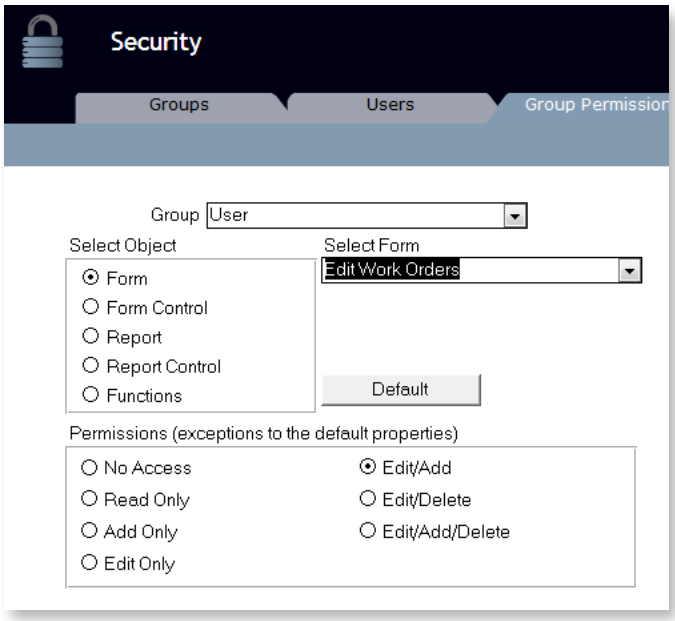
To remove a user from a particular group, highlight the group name in the **Member Of** pane and then click the **Remove<<** button.

Changing or Deleting User IDs

To edit user information, first locate the record by selecting the User ID from the drop-down list. You can then change the user's full name or password. You cannot change a User ID; it can only be deleted and a new one created. To delete a User ID, locate the record and click the **Delete** button under the **Name** field.

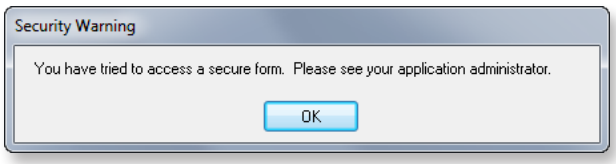
Security – Group Permissions Tab

Create unique sets of rights for each group using the **Group Permissions** tab. Permissions can be set for each object: form, form control, report, report control or function. Permissions range from Full Edit rights to Add and Delete rights to No Access. All permissions can be reset to the original settings by clicking the **Default** button.



Tip: To assign unique rights to an individual user, create a unique group for that user and then use this form to assign the specific rights.

The user will receive this security warning when trying to access an object with No Access permission:



To hide the controls to which the user has no access, you must have administrative rights. Navigate to the **Setup -> Settings -> Security** tab. Check the **Hide Buttons With No Rights** checkbox.

The **Group Permissions** tab contains the following fields:

Group: Select the name of the group whose rights you want to edit from the drop-down list.

Select Object: Choose from the options by clicking the appropriate radio button.

- Form – edit rights to forms
- Form Control – edit rights to specific fields and buttons within forms
- Report – edit rights to FaciliWorks reports
- Report Control – edit rights to specific fields within reports
- Functions – edit rights to the following FaciliWorks functions:
    - Audit Log
    - Calculate Due Dates and Meters
    - Compact/Repair Database
    - Create Purchase Orders
    - Create Service Requests
    - Create Unscheduled Work Orders
    - Fill Maintenance Dates
    - Fill Part and Tool Use
    - Find Uncodeable Records
    - Modify License
    - Remove Spaces
    - Repair Work Order Dates
    - Report Designer setup
    - Reset Open Tasks
    - Reset Tools Issue status
    - Synchronize Inventory Costing

Select Form/Report: This field appears when you select the object type. Simply choose each record or report category to which you need to assign rights for this group. You can edit rights for only one category at a time.

Select Control: If you choose to assign permissions to specific form or report controls, this field appears. First, choose the form or report in the **Select Form/Report** field. Then, select each field/button to which you want to assign specific rights. For example, if you want this group to access and edit asset records, but not clone them, select the **Clone** button in this field, then define the type of access in the **Permissions** field.

Permissions: The available options in this field will vary, depending on the specific object chosen. Permissions are listed below; all permissions may not appear for every selection.

- Form
  - › No Access – Users cannot see, edit, add or delete records in this category.
  - › Read Only – Users can only view records.
  - › Add Only – Users can only add new records in this category.
  - › Edit Only – Users cannot add or delete records, but can edit them.
  - › Edit/Add – Users can change and add new records.
  - › Edit/Delete – Users can edit or delete existing records, but not add new ones.
  - › Edit/Add/Delete – Users can change, add and delete records in this category.

- Form Control
  - › No Access – Users won't even see this field or button (for example, you can block users from seeing salary-related fields in Staff Entry).
  - › Visible – Disabled or Enabled – Users see this button, but cannot use it ("disabled" and "enabled" refer only to the button's appearance).
  - › Read Only – Disabled or Enabled – Users see this field, but cannot change its contents ("disabled" and "enabled" refer only to the button's appearance).
  - › Read/Write – users can view and change the contents of this field.

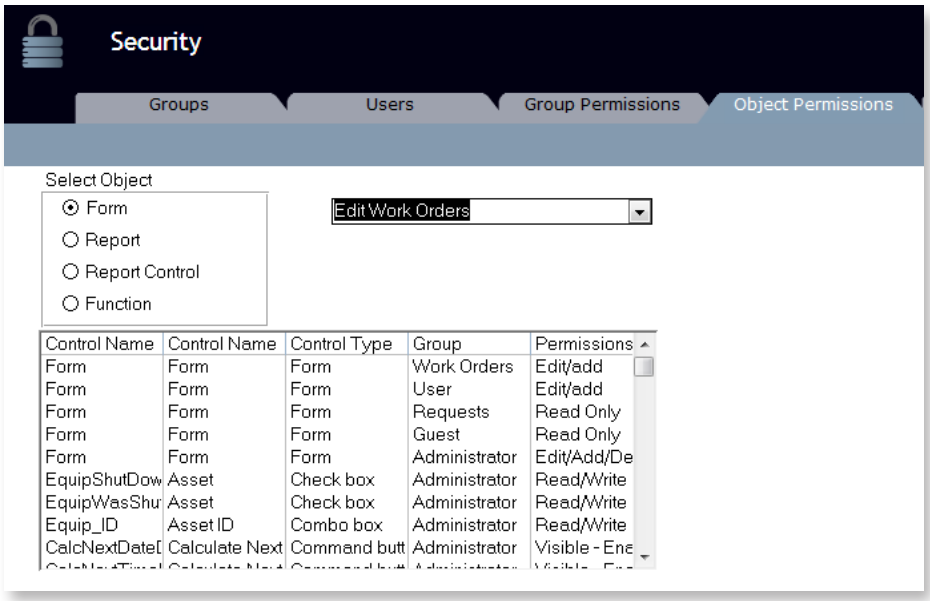
- Report
  - › No Access – Users cannot view this report (it won't appear in the list of available reports on the Reports menu).
  - › Print – Users can print this report.

- Report Control
  - › No Access – Users will not see the field on the report.
  - › Print – When users print the report, this field will appear.

Important: Make sure you coordinate the permissions that you assign. For example, you can't allow a group to add new asset records, but then remove their access to the **Asset ID** field.

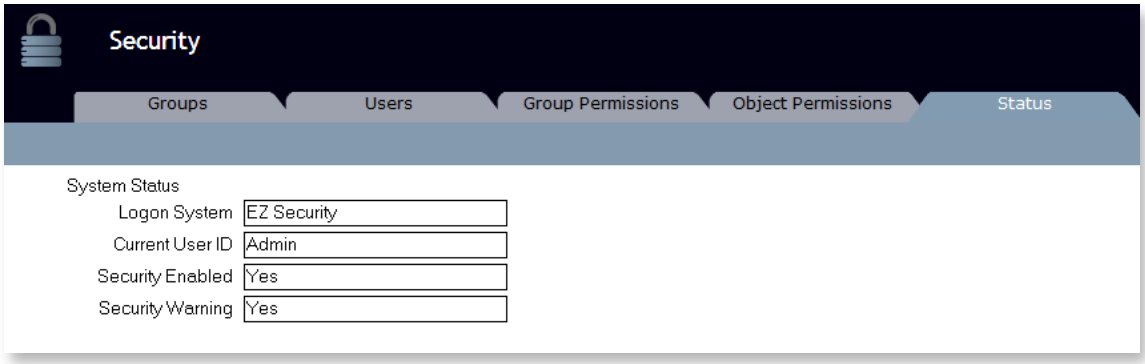
Security – Object Permissions Tab

Use this form to view a summary of the permissions you've assigned for a particular form or report. This feature will be helpful as you define specific rights in the **Group Permissions** tab. In the **Select Object** pane, select the type of object you want to view and then select the specific object from the drop-down list. FaciliWorks will display a listing of permissions for that object, including control permissions (fields/buttons) and group names.



Security – Status Tab

The **Status** tab gives you a quick view of your system security.



Logon System: This is the type of logon security used (based on the **Logon Method** selection you made in the **Setup -> Settings -> Security** tab).

- If your **Logon Method** is Application Logon, your **Logon System** is EZ Security.
- If your **Logon Method** is Windows Logon, your Logon System is **Win 95/98/NT**.

Current User ID: This field displays the ID of the user who is currently logged in.

Security Enabled: Based on **Settings -> Security -> Enable Security**.

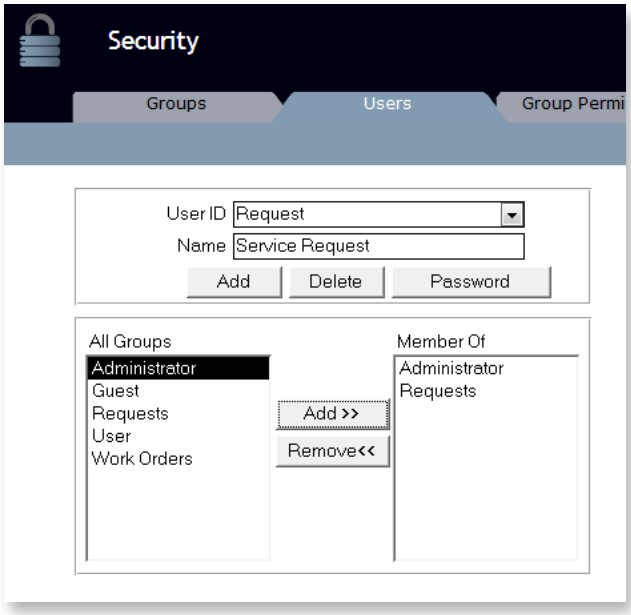
Security Warning: Based on **Settings -> Security -> Enable Security Messages**.

Staff User List

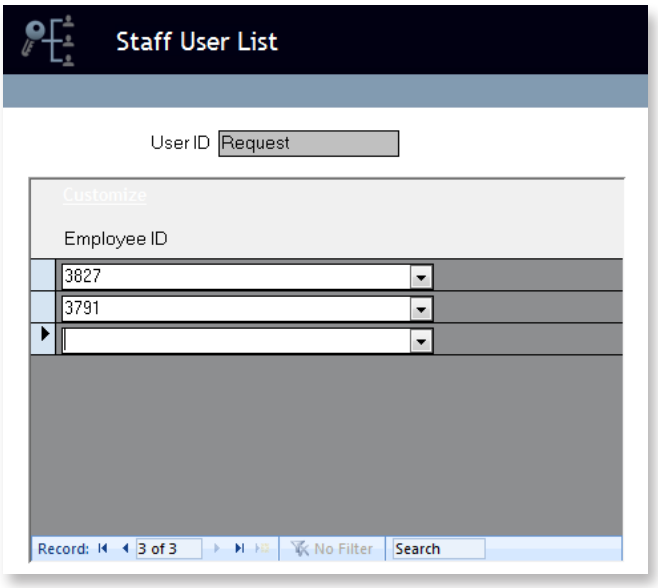
Navigate to **Personnel -> Staff User List**. The **Staff User List** is created for staff (without personal login credentials) to share a user login with a user of the system. A shared list can only be created for the user who is currently logged in. This form can be accessed only when security is enabled.

Based on default security settings, only a user in the Administrator group can access this form. So, if you want to create a staff user list of service requesters, for instance:

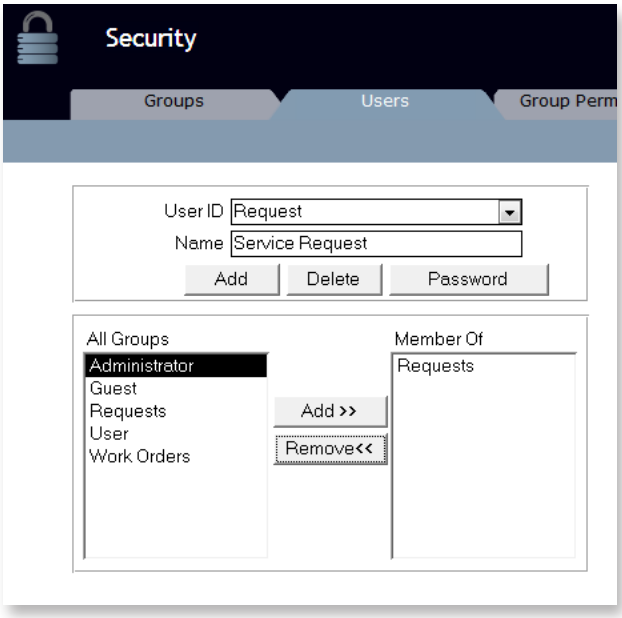
1. Temporarily grant the Request user admin rights:



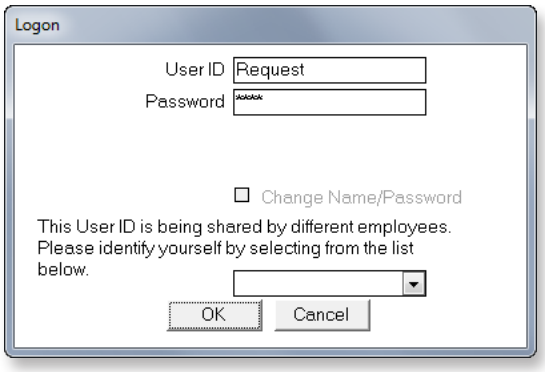
2. Then, log in as Request and create the staff user list. When navigating to this form, the current User ID is auto-filled into the **User ID** text box. Use the **Employee ID** drop-down list to add employees to the list. The **Record Navigation Bar** displays the number of employees sharing the login credentials of the current user.



3. Then, remove Request from the Administrator group:



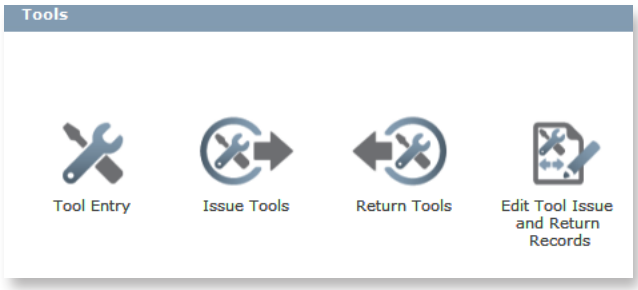
If a **Staff User List** is indicated when logging into FaciliWorks, a modified login screen is displayed:



Select your **User ID** from the drop-down list and then click **OK** to log in. The user is identified on the bottom left corner of the FaciliWorks application window as the person logged into the system, not the staff member from the list.

Chapter Ten:
Tools

To keep track of all tools in the tool crib, FaciliWorks provides the **Tools** menu. In this menu, tools are recorded and documentation is stored regarding where the tools were issued, the employee to whom the tools were issued and the return of the tools to the tool crib.

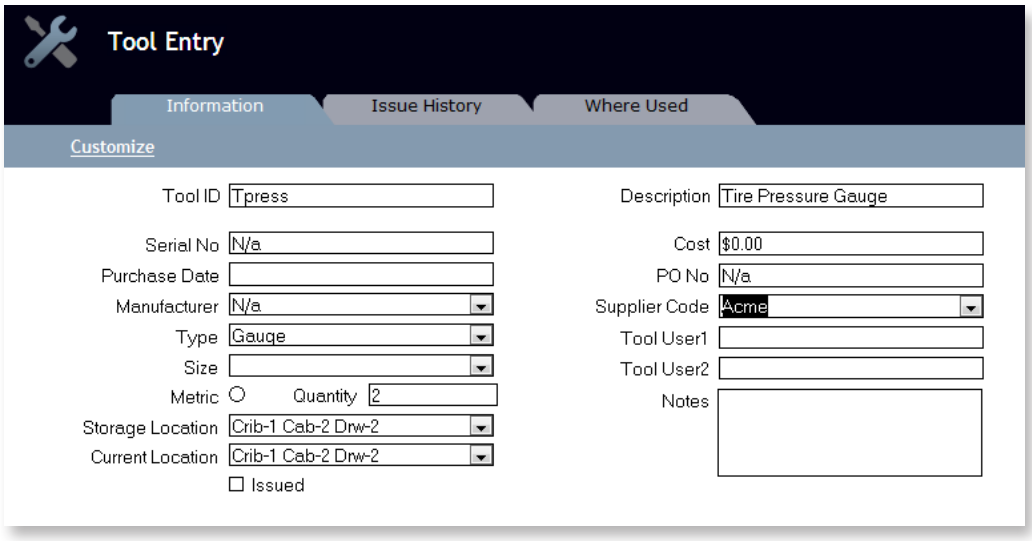


Tool Entry

From the Main Menu, navigate to **Tools -> Tool Entry** to create and edit records for all of your tools. FaciliWorks automatically keeps track of each tool's issue and usage history.

Tool Entry – Information Tab

The **Information** tab captures data about each tool in the tool crib.



Tool ID: Enter a unique alphanumeric code for each tool.

Serial No.: Enter the tool's serial number or model number.

Purchase Date: Enter the date on which the tool was purchased.

Manufacturer: Enter the name of the tool's manufacturer.

Type: Select or enter the type of tool. Because this field can be used to filter your tool records, it is recommended that you be consistent with your entries.

Size: Enter the tool's size or range of use. Because this field can be used to filer your tool records, it is recommended that you be consistent with your entries.

Metric: Click this radio button if the tool is metric.

Quantity: If this tool contains different pieces or is part of a set, enter the total number of pieces in the set.

Storage Location: Enter the tool's storage location.

Current Location: The current location of the tool is automatically updated when the tool is issued and returned.

Issued: When a tool is issued, FaciliWorks automatically checks this checkbox and updates the current location of the tool.

Tool Description: Enter a brief description of the tool.

Cost: Enter the tool's original cost.

PO No.: Enter the purchase order number used to purchase the tool.

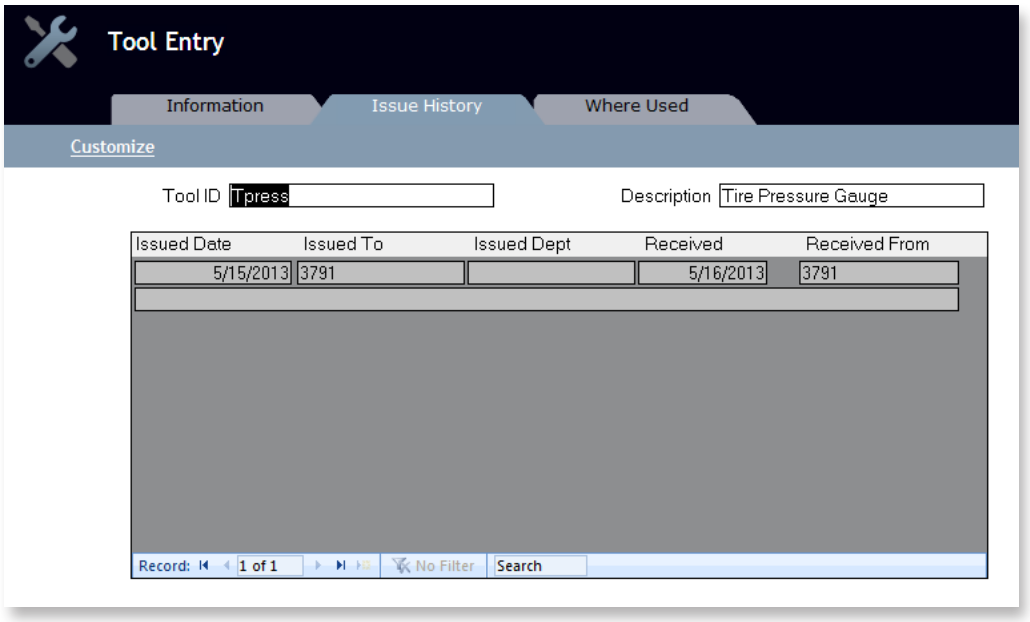
Supplier Code: Enter a supplier or select a supplier from the database using the drop-down list.

Tool User 1 and **Tool User 2**: These two custom fields are used for additional information you need for each tool.

Notes: Enter any additional comments about the tool.

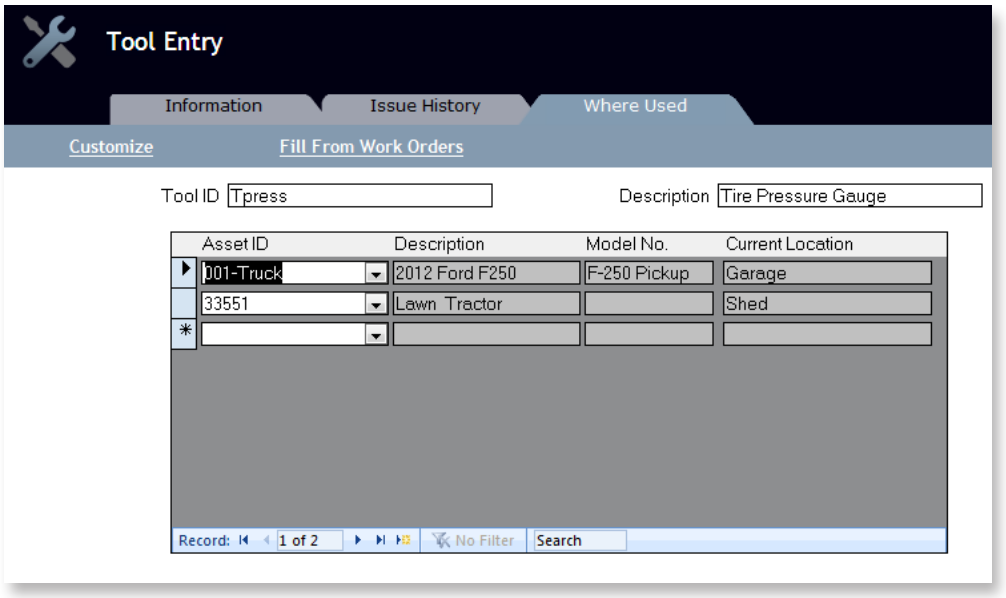
Tool Entry – Issue History Tab

The **Issue History** tab automatically records every occasion on which a tool has been issued and returned. The most recent information is listed first. You cannot edit this information here; the data is captured under the **Tools** menu in **Issue Tools** and **Return Tools**.



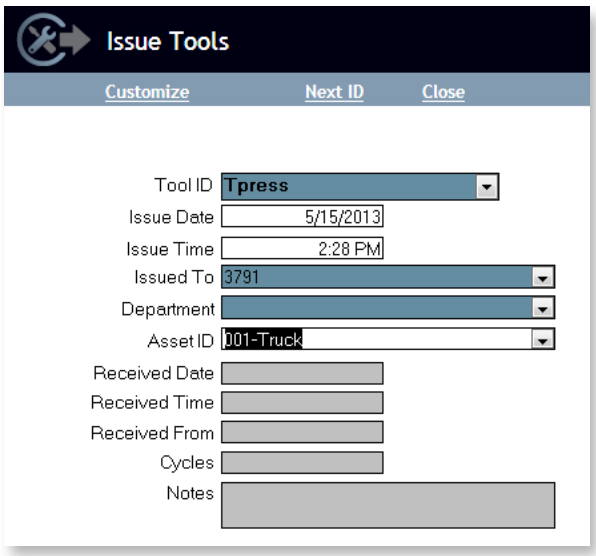
Tool Entry – Where Used Tab

In this form, list each asset that uses the tool. Select as many **Asset IDs** as needed; the remaining asset information will be auto-filled. Click the **Fill from Work Orders** button to automatically insert the **Asset IDs** from completed work orders.



Issue Tools

To issue tools, navigate from the main menu to **Tools -> Issue Tools**. The **Issue Tools** form helps you to track tool location and usage including reasons for use and the number of times used.



Tool ID: Select the tool to issue from the drop-down list. Only those tools that are not currently issued will be on the list.

Issued Date: This field is auto-filled with the current date. To change the date, click the field text box to display the calendar icon and then click the icon to view the pop-up calendar.

Issued Time: This field is auto-filled with the current time. If the time displayed is not accurate, reset the clock for your computer using the Windows Control Panel. This field can be edited.

Issued To: Select or enter the name of the person to whom the tool is being issued.

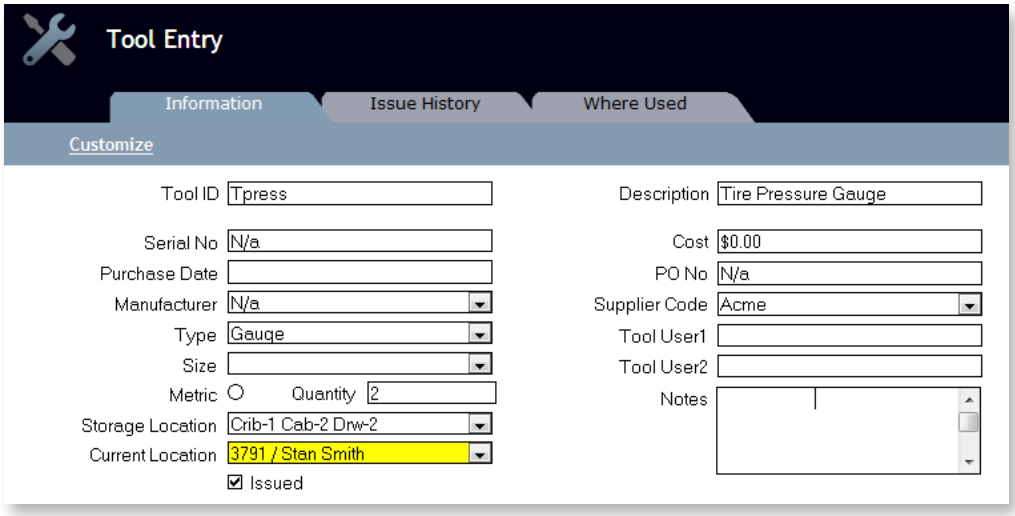
Department: Select or enter the name of the department that will use the tool.

Asset ID: If the tool is issued for use on an asset, select that asset here.

The remaining fields on this form are not editable here. They will capture return information that is entered in **Return Tools**.

Use the **Customize** button here to modify the field labels. The **Next ID** button updates and stores the current record and displays a new blank record to capture the next tool for issue. Click **Close** to return to the **Tools** menu.

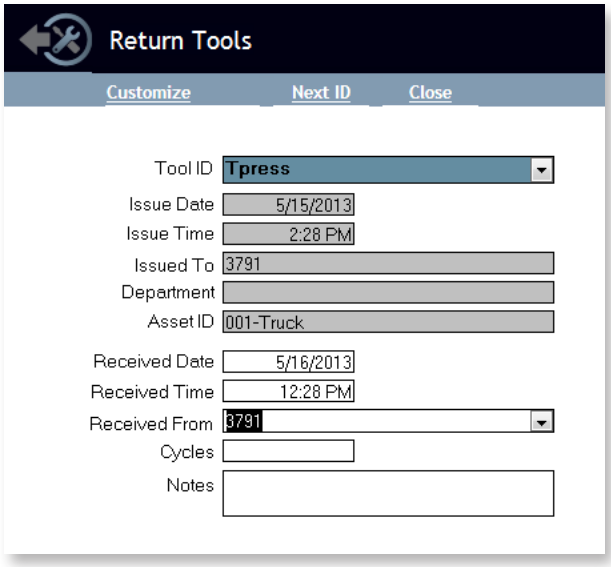
When the tool has been issued, FaciliWorks automatically updates the **Tool Entry -> Information** tab to show the status change. The **Current Location** field now shows the name of the person who has the tool and the **Issued** checkbox is now checked, showing that the tool has been issued:



Return Tools

To return tools, navigate from the main menu to **Tools -> Return Tools**. The **Return Tools** form captures information when returning a tool to the tool crib.

Select the **Tool ID** of the tool to be returned from the **Tool ID** drop-down list. Only the tools that are currently issued out will be listed here. Upon selecting the tool, the issue information is auto-filled into the grey fields.



Received Date: This field automatically displays the current date. To change the date, click the field text box to display the calendar icon and then click the icon to view the pop-up calendar.

Received Time: This field automatically displays the current time. This field can be edited.

Received From: Enter the name of the person or department returning the tool.

Cycles: Enter the number of times the borrower used the tool.

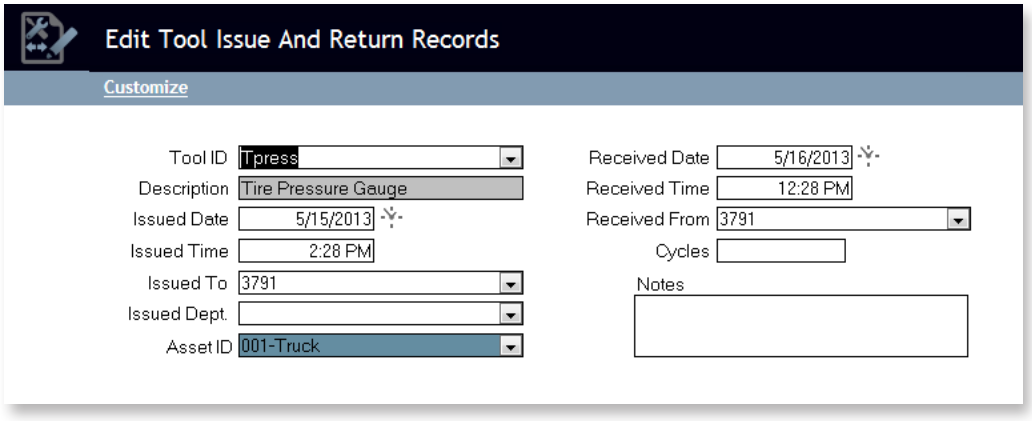
Notes: Enter any additional information such as the current condition of the tool.

Use the **Customize** button here to modify the field labels. The **Next ID** button updates and stores the current record and displays a new blank record to enter return information for another tool. Click **Close** to return to the **Tools** menu.

When the tool is successfully returned, the tool's **Current Location** reverts to its **Storage Location** and the **Issued** checkbox (in the tool's **Information** tab) is no longer checked.

Edit Tool Issue and Return Records

To modify tool issue and return records, select **Tools** from the Main Menu and then click **Edit Tool Issue and Return Records**. This form displays all historical issue and return information for each tool, for every issuance and return.

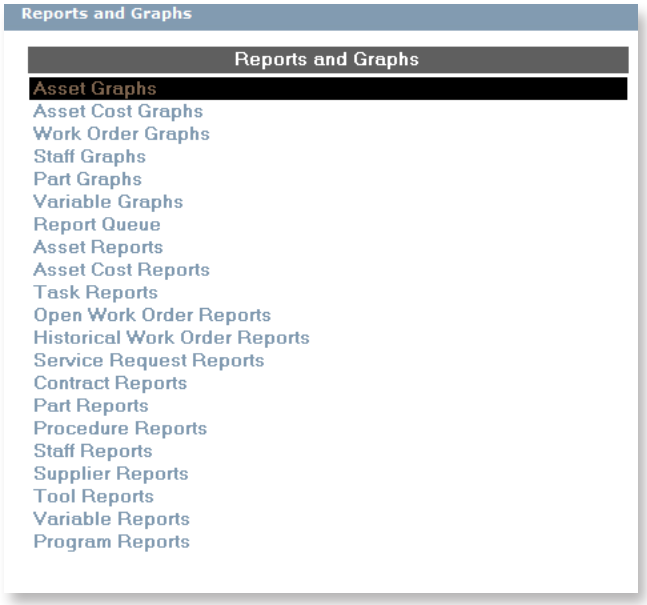


The fields on this form are similar to the fields described on the **Issue Tools** and **Return Tools** forms; however, this form includes tool description. Make any necessary changes to the record and save the changes.

To view all tool issue, usage and return information, navigate to the **Reports and Graphs** menu, select **Tool Reports**, then select **Tool Issue History**.

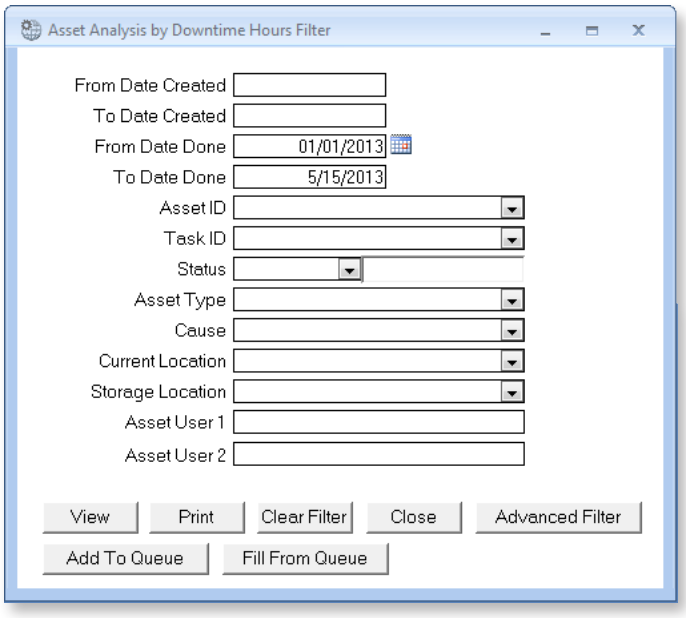
Chapter Eleven:
Reports & Graphs

FaciliWorks includes a variety of pre-defined standard reports and graphs. Upon selection of a report, a filter window opens which allows you to select a specific group of records and entries that will be included in the display. Reports and graphs can be based on date and/or time and one or more fields. To print or view reports and graphs, select **Reports and Graphs** from the Main Menu; the list of available report and graph categories is displayed. Select the name of the group you want to view; FaciliWorks will display below it a list of the reports or graphs in that category from which to choose.



Report Filters

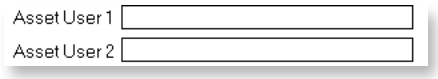
Each report opens with a filter window. This window allows you to define a specific group of records to analyze; some reports allow you to sort the data according to your preference. Many reports give you a choice between a summarized listing and a detailed report. Most of the report filters contain special options which will be discussed in later sections.



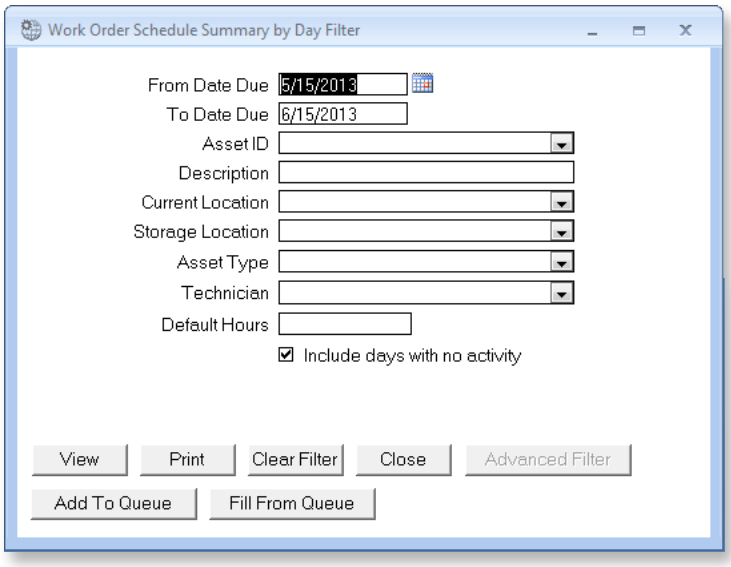
Date Fields: Type a date directly into a date field or double-click in a date field to select a date from the pop-up calendar.

Drop-down Lists: When a filter field has an arrow on its right side, click the arrow to see a drop-down list of available entries. Highlight any item to select it. You can also start typing in the information you want; FaciliWorks will go to the first entry in the list that starts with the characters you type.

User-defined Fields: The two user-defined fields appear on many reports. You can customize these and other field names; your custom names will appear in entry forms, report filters and reports. Please see the **Setup -> Settings -> Interface** tab for information about change labels.



Checkboxes: Some report filters have checkboxes which can be used to include additional information or limit the report by a particular field. In the sample filter shown here, the **Include days with no activity** checkbox is checked so that the **Work Order Schedule Summary** shows all pertinent information.



View: Click this button to see a print preview of the report.

Print: Click this button to print every page of the report without previewing it.

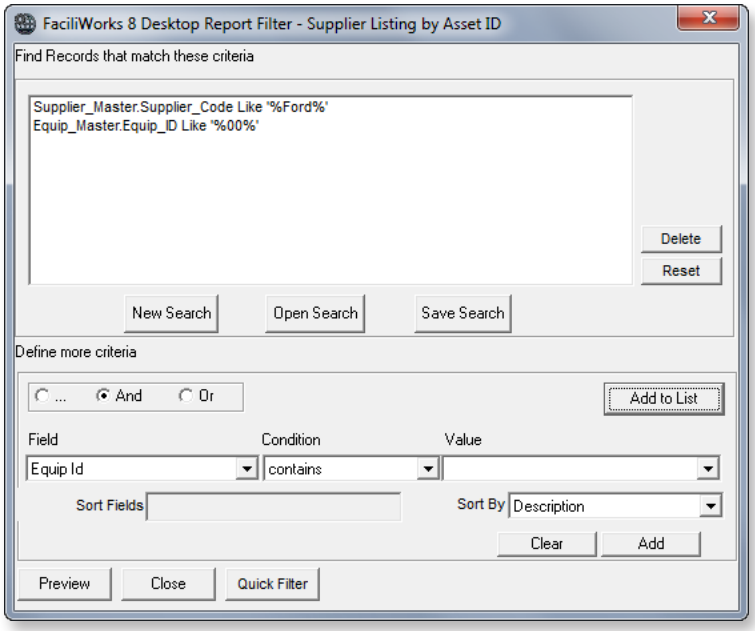
Clear Filter: Click this button to remove all filter choices.

Close: Click this button to return to the report listing.

Add to Queue: Add the current filter to the print queue.

Fill from Queue: Select a previously saved filter from the print queue.

Advanced Filter: This option allows you to create more complex criteria for filtering your report. With the Advanced Filter, you must build criteria for your report to act as your records filter. You can save a filter by giving it a name and open it again for reuse. By selecting the **Save Search** button, you can specify a filter name in the **Report Filter** dialogue window.



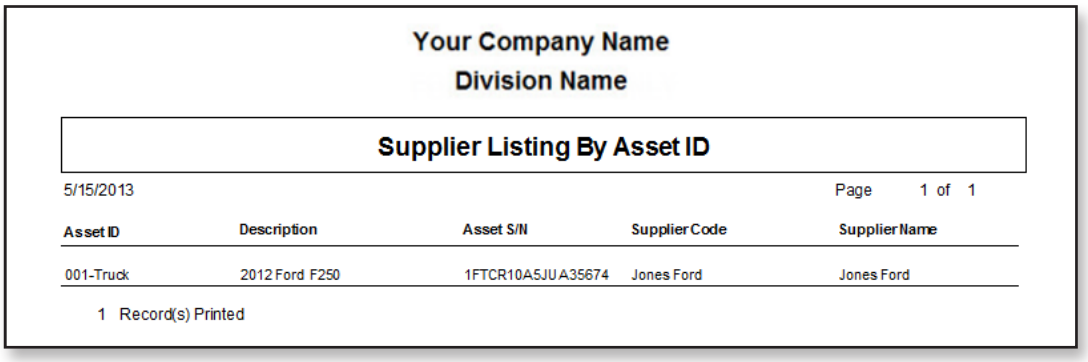
In the example above, we are searching for all suppliers whose **Supplier Codes** contain "Ford" and supply us with assets whose **Asset IDs** include "00."

Begin by selecting **Supplier Code** from the **Field** drop-down list. Choose **Contains** from the **Condition** drop-down list and then type **Ford** in the **Value** field. Click the **Add to List** button and the first criterion will appear in the upper portion of the filter window (the **Criteria List Box**).

Make sure the **And** radio button is selected.

Then, from the **Field** drop-down list, select **Equip ID** (which is synonymous with Asset ID), select **Contains** from the **Condition** drop-down list and then type **OO** in the **Value** field. Click the **Add to List** button.

Our specified criteria are in the **Criteria List Box**. Click the **Preview** button to see the report:



Your Company Name
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Supplier Listing By Asset ID

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Asset ID	Description	Asset S/N	Supplier Code	Supplier Name
001-Truck	2012 Ford F250	1FTCR10A5JUA35674	Jones Ford	Jones Ford

1 Record(s) Printed

From the **Preview** window, the report can be printed or exported. Choose **Output To** from the **File** menu to export reports as text file, Microsoft .RTF, .HTML, or Microsoft Excel spreadsheet format (.XLS). If you save a file in .RTF format and open it in a word processing application such as Microsoft Word, your data appears in a formatted table. When you save the output in .XLS or .RTF format, it includes fonts, layout and other formatting elements. Select **File -> Send** or click **Send** in the **Report Toolbar** to output reports to Microsoft Outlook or any other MAPI compatible mail program. The output does not include subforms or subreports.

The fields in the **Advanced Filter** window are defined as follows:

Criteria List Box: Displays a listing of the generated criteria.

New Search: Click to create a new filter name.

Open Search: Opens a list of previously saved search criteria.

Save Search: Saves newly created or modified criteria.

And and **Or**: When defining criteria, use these radio buttons to connect criteria. Use **And** if both premises must be true; use **Or** if only one premise must be true.

Add to List: Click this button to add your defined criteria to the criteria list box.

Field: This drop-down list shows all the fields you can search in the selected report. Field names appear as column headings in the printed report.

Condition: This drop-down list shows the field operators you can use to create search criteria:

- contains — The value listed is a subset or is part of the search field.
- begins with — The search field begins with the value listed.
- ends with — The search field ends with the value listed.
- is between inclusive — The value listed is within the contents of the search field from the first to the last entries, including the first and last entries.
- is between exclusive — The value listed is between the first and last entries of the search field.
- not like — The value listed is not a subset of or is not part of the search field.
- = — The search field matches the value listed exactly.
- <> — The search field is not equal to the value listed.
- < — The search field is less than the value listed.
- > — The search field is greater than the value listed.
- <= — The search field is less than or equal to the value listed.
- >= — The search field is greater than or equal to the value listed.
- Is & Is Not — This works only in conjunction with the Null value (empty field).

Value: Enter a value to be used in your search. Values may be letters and/or numbers or a date; however, the **Value** field will not permit you to enter letters for a numeric field and only allows dates for date fields.

Sort Fields: This field lists the **Sort By** fields you have selected, separated by commas.

Sort By: This drop-down list shows available sort fields. Records are arranged using this field as reference.

Clear: Resets the **Sort By** field.

Add: Adds the value of the **Sort By** field to the **Sort Fields** entry.

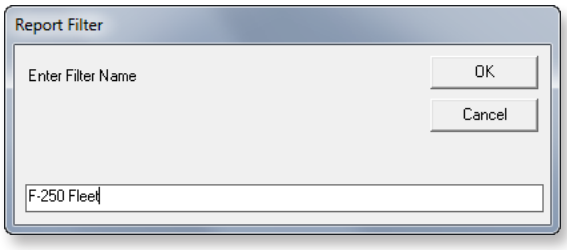
Preview: Previews the report on the form.

Close: Closes the **Report Filter** window.

Quick Filter: Returns you to the **Quick Filter**.

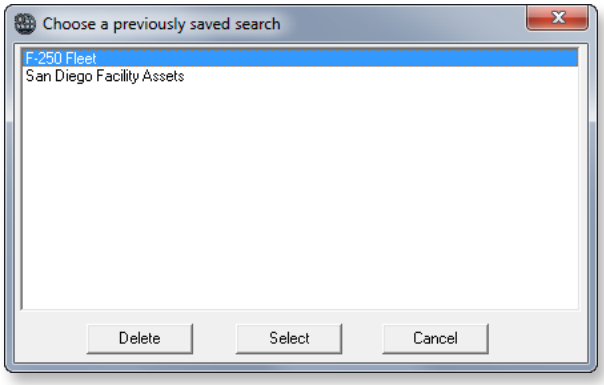
Report Queue

The **Report Queue** allows the user to store and retrieve the most frequently used criteria. Once a filter criterion has been set up, you can simply add this to the queue by clicking **Save Search**. The following window opens:



Type a name for your search and click **OK**.

To open that search at a later date, click **Open Search** in the **Report Filter**. The following window opens, listing all previously saved searches:



Click the report name to select it and click the **Select** button (or double-click the report name) and the saved search will open in the **Report Filter** window. It can then be modified if necessary or viewed and printed.

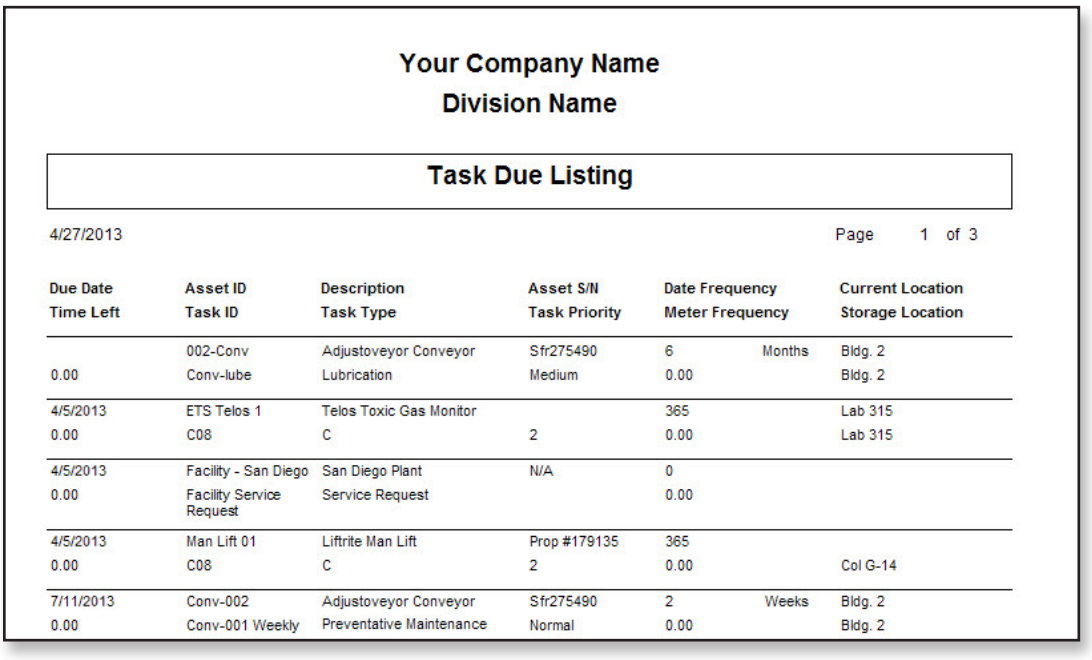
Automatic Task Due Listing Report

The **Task Due Listing Report** gives you an overview of all work that is due based on date. FaciliWorks will generate an automatic report each time you launch the software.

Follow these steps to automatically generate a **Task Due Listing Report**. You must have administrative permission to access the **Setup** menu.

1. Navigate to the **Setup -> Settings -> Options** tab. From this form, you can enable this feature and enter settings.
2. Check the **Enable Auto Task Due Listing Report** checkbox.

3. Enter the **Number of Days To Look Ahead** for work due and the **Amount of Meter-Time Left**.
4. Close FaciliWorks, relaunch it and log back in.
5. The **Task Due Listing Report** (similar to the one shown below) will be displayed:



Your Company Name
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Task Due Listing

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Due Date / Time Left	Asset ID / Task ID	Description / Task Type	Asset S/N / Task Priority	Date Frequency / Meter Frequency		Current Location / Storage Location
	002-Conv	Adjustoveyor Conveyor	Sfr275490	6	Months	Bldg. 2
0.00	Conv-lube	Lubrication	Medium	0.00		Bldg. 2
4/5/2013	ETS Telos 1	Telos Toxic Gas Monitor		365		Lab 315
0.00	C08	C	2	0.00		Lab 315
4/5/2013	Facility - San Diego	San Diego Plant	N/A	0		
0.00	Facility Service Request	Service Request		0.00		
4/5/2013	Man Lift 01	Liftrite Man Lift	Prop #179135	365		
0.00	C08	C	2	0.00		Col G-14
7/11/2013	Conv-002	Adjustoveyor Conveyor	Sfr275490	2	Weeks	Bldg. 2
0.00	Conv-001 Weekly	Preventative Maintenance	Normal	0.00		Bldg. 2

To disable the **Automatic Task Due Listing Report** feature, navigate to the **Setup -> Settings -> Options** tab and uncheck the **Enable Auto Task Due Listing Report** checkbox to disable it.

Report Titles, Descriptions and Special Filtering Options

Asset Reports

Agreement Due Listing: A detailed list of expiration dates of warranties and service agreements and includes asset ID, description, current location, effective date, warranty cost, asset user 1, asset user 2, storage location and agreement term.

Asset Barcode Label (½, 1 ½ , 1 Inch): Use this report to print barcode labels for your assets. In the filter, you can select the width of the label (½", 1", or 1½"). The length of the barcode determines the length of the label; FaciliWorks will print the shortest possible label.

Asset Detail Report: Detailed asset information, including status, importance, serial number (S/N), manufacturer, current location and storage location.

Asset Listing: A listing of current assets, ordered by asset ID, categorized by:

- Current Location
- Asset Type
- Current Location with Tasks
- Description
- Description with Tasks

Asset Listing by Asset Type: A list of current assets, ordered by asset type.

Asset Listing by Current Location: Current assets grouped by current location and ordered by asset ID within each group.

Asset Listing by Current Location with Tasks: Current assets with associated tasks, grouped by current location and ordered by asset ID within each group.

Asset Listing by Description: Current assets, ordered by asset description.

Asset Listing by Description with Tasks: Current assets with associated tasks, ordered by asset description.

Asset Status History by Asset ID: A list of assets by asset ID and their status.

Asset Status History by Status: A list of assets by status.

Asset Status History Summary: A summarized list of asset status.

Asset Status Report: This asset status report creates a summarized list of assets, based on the status you select. Use this report to print a list of all inactive assets or items in need of repair. You can also print a list of your spare or backup assets. If you leave the status field blank, the list will include equipment of any status.

Asset Usage History: A listing of when, where and for what purpose you've used assets during a specific time frame. You can filter for assets issued to one or more departments, for one or more purchase orders or for one or more part numbers. This report helps you provide documentation for billing and cost accounting and it can be a valuable tool for long-term asset purchase and replacement planning.

Component Listing Report by Child: A listing of each asset, sorted by child asset ID, detailing child components of each asset.

Component Listing Report by Parent: A listing of each asset, sorted by parent asset ID, detailing child components of each asset.

Asset Analysis by Contract Cost with Component: An analysis of scheduled and unscheduled maintenance costs for an asset. It includes the cost of child assets as part of the cost of the parent asset, hence the term "with component." This report is sorted by the cost of contract items for the maintenance.

Asset Analysis by Contract Costs: An analysis of scheduled and unscheduled maintenance costs for an asset. It is sorted by the cost of contract items for the maintenance.

Asset Analysis by Downtime Hours: An analysis of scheduled and unscheduled maintenance costs for an asset. It is sorted by the number of maintenance downtime hours.

Asset Analysis by Labor Cost with Component: An analysis of scheduled and unscheduled maintenance costs for an asset. It includes the cost of child assets as part of the cost of the parent asset, hence the term "with component." This report is sorted by the cost of labor items for the maintenance.

Asset Analysis by Labor Costs: Lists the labor costs associated with each asset, sorted by asset ID.

Asset Analysis by Labor Hours: An analysis of scheduled and unscheduled maintenance costs for an asset, sorted by the number of labor hours.

Asset Analysis by Labor Hours with Component: An analysis of scheduled and unscheduled maintenance costs for an asset. It includes the cost of child assets as part of the cost of the parent asset (with component). This report is sorted by the number of maintenance labor hours.

Asset Analysis by Part Cost with Component: An analysis of scheduled and unscheduled maintenance costs for an asset. It includes the cost of child assets as part of the cost of the parent asset (with component). This report is sorted by the cost of parts used for maintenance.

Asset Analysis by Part Costs: An analysis of scheduled and unscheduled maintenance costs for an asset. It is sorted by the total cost of parts used for maintenance.

Asset Analysis by Total Cost with Component: An analysis of scheduled and unscheduled maintenance costs for an asset. It includes the cost of child assets as part of the cost of the parent asset (with component). This report is sorted by the total cost of contracts, parts and labor associated with the asset's maintenance.

Asset Analysis by Total Costs: An analysis of scheduled and unscheduled maintenance costs for an asset. It is sorted by the total cost of contracts, parts and labor associated with the asset's maintenance.

Asset Analysis by Work Order with Component: This report is an analysis of scheduled and unscheduled maintenance costs for an asset. It includes the cost of child assets as part of the cost of the parent asset (with component). This report is sorted by work order.

Asset Analysis by Work Orders: An analysis of scheduled and unscheduled maintenance costs for an asset and is sorted by work order.

Operating Costs Detail Report: A detailed listing of an asset's operating costs, i.e., Fuel, Oil and Tire. (These are three of the four sub-tabs within the Assets -> Operating Costs tab.)

Other Costs Detail Report: A detailed listing of an asset's operating costs aside from fuel, oil and tires, i.e., the costs entered into the Assets -> Operating Costs -> Other sub-tab.

Other Costs Summary Report: A summarized listing of an asset's operating costs aside from fuel, oil and tires, i.e., the costs entered into the Assets -> Operating Costs -> Other sub-tab.

Task Reports

Task Detail Listing: The filter for this report permits you to search for tasks by ID, priority, type or assigned technician. Use the shutdown checkboxes to isolate tasks that require asset or facility shutdowns. Task details included in the report are: labor, contracts, parts, tools, variables and procedures required for each task and a notation of whether the maintenance schedule is fixed or floating.

Task Due Listing by Asset ID: Tasks due, sorted by asset ID.

Task Required Parts List: Required parts for each task and also includes basic task information such as ID, priority, technician, type and time needed to perform the task.

Shadowed Task Listing: Sorted by asset ID, this listing of tasks and shadowed tasks can be filtered by asset ID, asset S/N, description or current location.

Open Work Order Reports

Backlog Work Orders: Active assets that are past due for maintenance based on date or meter reading.

Multiple Asset Work Order: Work orders with multiple assets.

Open Work Orders from Requests: A summary of work orders, filtered by date, asset or task ID, cause, requester or technician. You can also filter for complete or incomplete work orders and for emergency or non-emergency work orders.

Procedure Attachments: Lists each work order, its associated procedures and the procedures' associated attachments.

Work Order: Use this report to view work orders created or completed during a specific time period. You can view or print work orders for one or more technicians, locations, assets or tasks. You can also choose to view only emergency or non-emergency work orders (or both) and/or only complete or incomplete work orders or both.

Work Order Actual Hours by Technician: A listing of work orders detailing the actual hours worked by the technician.

Work Order Compact with Full Proc Text: A compact listing of work orders, including meter readings, due dates, tool listings and complete procedure text for each work order.

Work Order Compact with Proc Name Only: A compact listing of work orders, including meter readings, due dates, tool listings and procedure name.

Work Order Due Listing by Asset ID, Current Location, Due Date and Meter Left: All work orders due, sorted by asset, location, due date or meter left, including the associated task information.

Work Order Progress: The progress of your current work orders. You can filter by date range on progress set, date range on progress change, asset ID, progress name, requester and priority.

Work Order Schedule Summaries by Day, Day of Week, Day with Detail, Month, Quarter, Week and Year: These summaries provide the numbers of jobs and hours for the specified date range.

Work Order Summary: A list of all work orders with completion status and date, sorted by asset ID. It also includes asset description and task ID and type.

Historical Work Order Reports

Asset Type Average Downtime: Average and total downtime and scheduled work orders for each asset.

Cost Center Average Downtime: A list of average downtime by cost center including total work orders for each cost center.

Labor Hours: Number of labor hours spent by each staff member on each work order. The list is sorted first by staff ID, then by work order number and includes the total number of hours worked.

Technician Average Downtime: A list of each technician's total number of work orders, total amount of downtime and average downtime. The list is sorted by average downtime.

Work Order Cause Downtime Average: Sorted by cause, this report lists the total number of work orders, total amount of downtime and average downtime for each cause.

Work Order Compare: Use this report to compare the costs of scheduled and unscheduled work orders, sorted by asset ID, i.e., contract, part and labor costs. The following reports also compare the costs of scheduled and unscheduled work orders:

- Work Order Compare Asset & Task Only
- Work Order Compare Asset Only
- Work Order Compare with Component

Work Order Cost Analysis: The work order cost analysis report gives you a quarterly sum of itemized work order costs, totals for the current year and previous year and a grand total (lifetime). Use it to quickly see summarized annual work order costs filtered by asset, task, technician or location.

Work Order Cost Analysis with Component: This report provides all the details of the work order cost analysis report, plus it includes work order costs from all attached components.

Work Order Cost by Cause: Lists each work order and sorts in ascending order by cause.

Work Order Costs and Labor: Summarizes each task, including the costs for contracts, labor and parts, category totals and a grand total. The filter permits you to isolate maintenance costs by asset, task, location or technician. You can filter for one task and compare the cost of the same task for different assets or for different technicians. You can also isolate emergency work orders for comparison with scheduled and unscheduled work orders.

Work Order Costs and Labor with Component: This report includes work order costs and labor from all attached components.

Work Order Created to Closed: Permits the maintenance supervisor to monitor overall response time for maintenance personnel including work order performance time. This report tracks the time between work order creation and work order completion.

Work Order Created to Started: This report will permit the maintenance supervisor to monitor initial response time for maintenance personnel. This report tracks the length of time between when a work order is created and when work begins on the work order. Note: maintenance personnel should select the Work Order Started Progress Name when work begins on a Work Order for more accurate accounting.

Work Order History: The Work Order History filter and report are similar to the Work Order filter and report. You can select work orders for one or more technicians, locations, asset or tasks. The filter permits you to select work order created and completed date ranges.

Work Order History Summary: Lists each work order associated with an asset and is sorted first by asset ID, then by task ID. It also shows the date done, technician and total hours.

Work Order History with Component: Includes the work order history from all attached components.

Work Order on Time Analysis by Asset: This report shows both the number and percentage of work orders that are completed early, late or on time, according to your asset's maintenance schedule. You can filter for a date range, asset and task ID, technician, cause, description, type and emergency status.

Work Order on Time Analysis by Task: Shows both the number and percentage of work orders that are completed early, late or on time, sorted by task. You can filter for a date range, asset and task ID, technician, cause, description, type and emergency status.

Work Order on Time Analysis by Technician: Sorted by staff ID, this report shows both the number and percentage of work orders that are completed early, late or on time. You can filter for a date range, asset and task ID, technician, cause, description, type and emergency status.

Work Order Progress History: This report shows the progress of your current work orders. You can filter for date range on progress set, date range on progress change, asset ID, progress name, requester and priority.

Work Order Scheduled vs. Unscheduled: This report can be filtered by due date or completion status. It shows both the number and percentage of scheduled and unscheduled work orders, sorted by asset ID.

Work Order Started to Closed: Monitor work order performance time. This report tracks the length of time between the creation date and the completion date of a work order and gives an average number of hours spent per work order. Note: maintenance personnel should select the Work Order Started Progress Name when work begins on a work order for more accurate accounting.

Service Request Reports

Service Requests Progress: Shows the progress of your current service requests. You can filter for date range on progress set, date range on progress change, asset ID, progress name, requester and priority.

Service Request Progress History: The history of progress changes of your current service requests. You can filter for date range on progress set, date range on progress change, asset ID, progress name, requester and priority.

Service Request Summary: Sorted by date, this summary of service requests shows service request number, entry date, requester, asset ID, desired date, status and emergency status.

Service Request Total Hours: Sorted by date, this report compares estimated hours to actual hours.

Service Requests: Each page of this report is a detailed overview of a current service request. The filter options include request date, staff ID, asset ID, priority, cause, status and approval status.

Service Requests by Requester: List of service requests and their associated details, sorted by requester.

Contract Report

Contract Listing: This report lists your maintenance contractors (with cost), sorted alphabetically by reference ID.

Part Reports

Part Barcode Label (½ Inch, 1 Inch, 1 ½ Inch): Use these reports to print barcode labels for parts. Select from label widths of ½", 1" or 1½". FaciliWorks determines label length by the length of the bar code; it prints each label on the shortest length possible. Printing barcodes requires the Maintenance Label Kit.

Part Consumption: Summarizes parts used during each month. It calculates the total used for the time period you select as well as the total cost, based on the part's current cost multiplied by total number used. Generate this report for one year at a time to see current part consumption information.

Part Listing: This brief parts report includes part number, description, stock type and quantity in stock.

Part Listing – Parts Used in Work Orders: Sorted by part number and then by asset ID, this is a list of each part used (and the quantity) in work orders.

Part Listing – Where Used: Sorted by part number, this is a list of each part and the assets on which the part is used.

Part Listing (Unattached): This report includes only unattached parts, but displays detailed information about each part including category, sub-category, part cost and inventory value.

Part Listing by Asset ID: Sorted by asset ID, this report lists each asset and its associated parts.

Part Listing Critical: Lists all critical parts and highlights parts that are below their reorder point.

Part Listing Detail: This report is similar to the Part Listing (Unattached) report in that it includes detailed part information such as category, sub-category, part cost and inventory value; however, this report lists all parts in the database.

Part Listing with Warehouse Info: This report is similar to the Part Listing Detail report in that it includes detailed part information such as category, sub-category, part cost and inventory value. This report also includes warehouse information.

Part Location Listing: Sorted by location, this report lists each location and every part at that location.

Part Low Stock: Sorted by part number, this report shows each part's stock quantity, reorder point, quantity on order, etc.

Part Low Stock with Critical Parts Only: Shows the current quantities and reorder points of critical parts.

Parts Predicted Consumption: Totals the expected part consumption from open work orders, open PMs and calculated future PMs. It will then display the total of each part required within the time frame specified in the report filter.

Part Reorder Calculation: Calculates the number of parts used in the past and, taking required delivery time into account, calculates how many parts need to be ordered to meet future needs (based on your current needs). You can filter for one or more part numbers or leave the Part No. field blank to see reorder information for all of your parts. The dates in the filter automatically default to the last three months, but can be changed.

Part Valuation by Part No.: Lists the total number of each part in stock and the cost of the entire stock of each part, sorted by part number. Description and supplier for each part are also given.

Parts Out of Stock: This report provides quantities in stock and on order, order dates, costs and expected delivery dates of all parts, sorted by part number.

Purchase Order Listing: Lists all purchase orders and their dollar amounts, order dates and received dates.

Purchase Order Summary: A summary of purchase orders placed with each supplier, sorted by supplier code.

Purchase Orders: Each page of the report is a detailed view of a purchase order. You can filter for orders by requisition or purchase order number, staff ID, supplier code, expected delivery date or date received.

Re-Order Part Listing: This is the report that opens when you click the View Orders button in Inventory -> Auto Generate Purchase Orders.

Procedure Reports

Procedure Listing: A list of every procedure name with full procedure text.

Procedure Listing by Asset ID: Displays each asset, its associated tasks and associated procedure names (procedure text is not included).

Procedure Listing by Asset Task: Displays each asset, each associated task and the list of procedures that are associated with each task (procedure text is not included).

Procedure Listing by Procedure Name: Sorted by procedure name, this report lists the assets and tasks associated with each procedure.

Procedure Listing with Attachments: Displays full procedure text and procedure attachments (images, etc.) for each procedure.

Staff Reports

Craft Performance: Listed by craft, this report shows the estimated hours, actual hours and productivity percentage of each craft category.

Payroll Report: Sorted by task ID, this report shows each task, the technician who performed the task, the number of hours spent, the technician's pay, total hours and total cost.

Staff Cert. Due Listing: Lists each staff member's certifications and corresponding expiration dates.

Staff Labor Performance Detail: Sorted by staff ID, this report shows estimated hours, actual hours and a productivity percentage for each asset on which that staff member performed maintenance. In the filter window, you can search by the creation or completion dates, staff, asset and task IDs and craft code.

Staff Labor Performance Summary: Sorted by staff ID, this report shows total numbers of estimated hours and actual hours as well as a productivity percentage.

Staff Report: All the current staff members and their hire dates, departments and job titles.

Staff Training Report: Shows your staff's certifications and other training and qualifications.

Supplier Reports

Supplier Listing by Asset ID: Sorted by asset ID, this report includes supplier information for each asset.

Supplier Listing by Supplier Code: Sorted by supplier code, this report lists all suppliers, their category, contact information and activity.

Supplier Listing by Supplier Code with Asset Data: Sorted by supplier code, this report lists all suppliers, their category, contact information, activity and all assets and parts they supply.

Supplier Listing by Supplier Name: Sorted by supplier name, this report lists all suppliers, their category, contact information and activity.

Supplier Listing by Supplier Name with Asset Data: Sorted by supplier name, this report lists all suppliers, their category, contact information, activity and all assets and parts they supply.

Supplier Listing by Supplier Type: Sorted by supplier type, this report lists all suppliers, their category, contact information and activity.

Supplier Listing by Type with Asset Data: Sorted by supplier type, this report lists all suppliers, their category, contact information, activity and all assets and parts they supply.

Tool Reports

Tool Barcode (½ Inch, 1 Inch, 1 ½ Inch): Use these reports to print barcode labels for tools. Select from label widths of ½", 1" or 1½". FaciliWorks determines label length by the length of the bar code; it prints each label on the shortest length possible. Printing barcodes requires the Maintenance Label Kit.

Tool Issue History: This report shows tool issue and return information. The filter is designed so that you can prepare a report that displays the usage for one or all tools issued or returned on a particular day. This report also shows the number of cycles used per issuance and the tool's current location.

Tool Listing: Sorted by tool ID, this report gives detailed information about every tool.

Tool Listing by Asset ID: If you leave the tool ID field blank in the report filter, the report will list each asset with all its associated tasks and tools. If you filter for a specific tool, this report will only list assets that require that tool.

Tool Listing by Tool: Sorted by tool ID, this report lists each tool and its associated assets and tasks.

Variable Reports

Out of Limit Variables: Lists variables that users have tested and marked as beyond minimum or maximum values. This report can be filtered by work order completed or created date, asset or task ID, variable and units.

Variable History Report: Each page of this report details the history of a variable, including asset, maintenance date, reading, units, etc. This report can be filtered by work order completed or created date, asset or task ID, variable and units.

Variable Listing: Sorted by variable name, this report details each variable, including variable notes (which could include variable testing instructions, variable testing checklist, etc.).

Program Reports

Audit Cards: This option allows you to print audit cards for a selected asset, task or both. Before a technician performs maintenance, leave an audit card in the work area. The return of the audit card demonstrates that the technician was on-site and actually performed the work. If used randomly, audit cards can be effective follow-up tools.

Audit Trail Report: Prints an audit trail report showing date/time, user ID, object and action taken. You can filter this report by date/time, object, user, action and data key.

Blank Forms: These templates can be printed and used as guides prior to entering data into FaciliWorks.

- Blank Form - Asset Entry
- Blank Form - Contract Entry
- Blank Form - Part Entry
- Blank Form - Procedure Entry
- Blank Form - Purchase Entry
- Blank Form - Service Request Entry
- Blank Form - Staff Entry
- Blank Form - Supplier Entry
- Blank Form - Task Entry
- Blank Form - Tool Entry
- Blank Form - Tool Issue and Return
- Blank Form - Tool Issue Sheet
- Blank Form - Tool Return Sheet
- Blank Form - Variable Entry
- Blank Form - Work Order

Budget by Cost Center: Shows a table of budgeted costs, actual costs and the difference between the two, by month; one report is generated for each cost center and each year.

Checklist Listing: A detailed listing of all checklist data, sorted by checklist name.

Group Permissions and Users: Details each user group's permissions (Add/Edit/Delete, Read/Write and Visible-Enabled) for all objects within FaciliWorks and includes control name and control type.

PM Sign-in Sheet: Attach or post the PM Sign-In Sheet to an asset for staff members to log maintenance performed on the asset. One sheet is generated for each asset in the database. In the filter, search by asset description to generate the desired sheet.

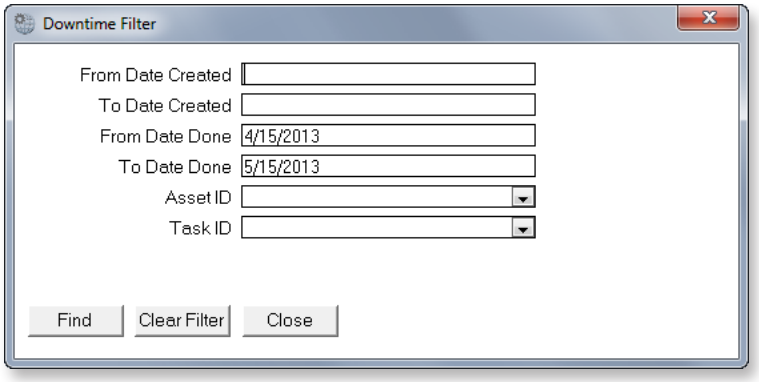
Report Control Listing: This report begins with Advanced Report Filter which is used the same way as the Advanced Filter (please see **Program Conventions** for detailed instruction). This report displays report names with their associated report control text (found at the bottom of every report page). Print the report to write new report control text (by hand) in the empty new text box.

Graphs

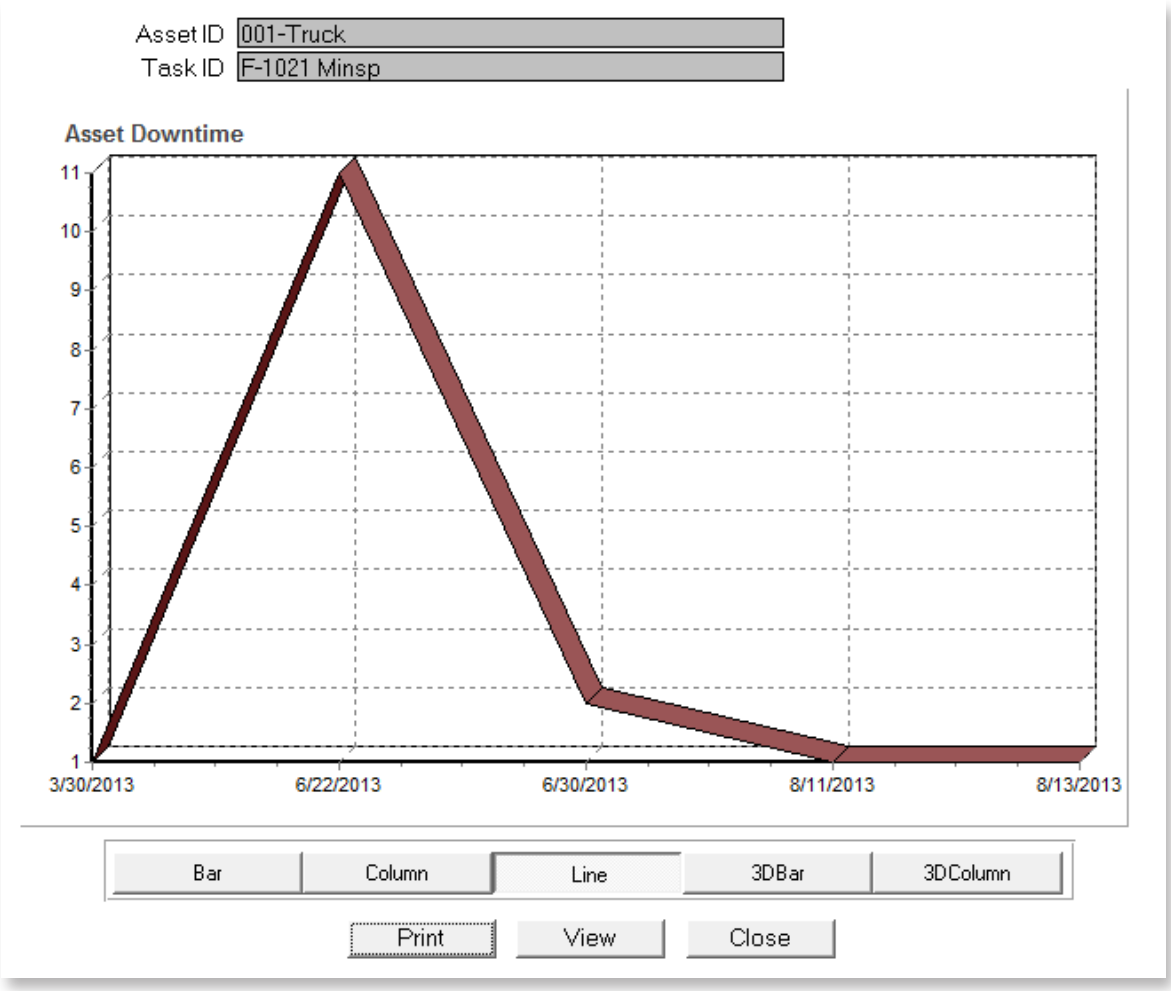
FaciliWorks graphs allow you to see comparisons and trends regarding asset downtime, inventory value, maintenance hours required or expended and estimated or expended costs. All of these graphs can be viewed on-screen, printed or emailed.

Graph Filters

As with reports, each graph starts with a filter that allows you to define the group of records you want to analyze. These filters work in the same way as the report filters, allowing you to create specific representations of your maintenance costs and activities.



Graph Formats



Click the buttons just below your graph to view it in any of these formats:

Bar: Horizontal bar graph

Column: Vertical bar graph

Line: Single line graph

3D Bar: Three-dimensional horizontal bar graph

3D Column: Three-dimensional vertical bar graph

Viewing, Printing and Emailing Graphs

Once you have selected the format you want for your graph, click the **Print** button at the bottom of the window to print it without a print preview. To see what your graph will look like when it is printed, click on the **View** button at the bottom of the window. A preview window will appear. You can use the window's scroll bars to see how your graph will appear and you can zoom in and out. To print from this window, click the **Print** icon in the Ribbon.

Graph Titles, Descriptions and Special Filtering Options

Asset Graph

Asset Downtime: This graph shows the downtime for a single asset and a corresponding task for a specified time period. Filter by either the date of creation or date of completion of the applicable work orders. Use this graph to determine whether an asset's downtime for a particular task has increased or decreased during the specified time period. If the filter finds two or more records that fit your filter criteria, you'll see individual graphs for each asset and task matching the criteria.

Asset Cost Graphs

Asset Costs by Type: Shows cumulative costs. If you update your asset records with current replacement costs, this graph will give you an accurate summary of original and replacement costs by asset type.

Asset Costs within Type: Original and replacement costs for assets, sorted by type.

Asset Fuel Cost: Charts the fuel costs of your asset over a period of time. You can filter for a single asset or leave the filter blank to view costs for all assets.

Asset Fuel Distance per Unit: Shows fuel consumption for specified units on the day it was consumed.

Asset Oil Cost: Charts the oil costs of your asset over a period of time. You can filter for a single asset or leave the filter blank to view costs for all assets.

Asset Oil Distance per Unit: Shows oil consumption for specified units on the day it was consumed.

Asset Tire Cost: Shows tire consumption over a period of time.

Asset Tire Distance per Unit: Tire consumption for specified units on the day it was consumed.

Asset Other Cost: Other costs (costs aside from fuel, oil and tires) over a period of time.

Work Order Graphs

Work Order Cost: Compares labor, contract, part and total costs filtered by date, asset, task, technician or location. FaciliWorks creates a separate work order cost graph for every asset ID and task ID that meets the selected criteria for easy comparison. Generate the same set of graphs twice, once with emergency work orders and once with non-emergency work orders to compare the difference in cost.

Asset Work Order Length: Compares estimated and actual task time. FaciliWorks creates a separate graph for each asset ID and task ID that meets the selected criteria for easy comparison.

Work Order Length by Tech.: Shows the total amount of time each technician spent on work orders during a specific time period. You can filter for a time period of work order creation or completion. Leave the staff ID field blank to see a separate graph for each technician who performed a work order during the specified date range.

Work Order Schedule: For any time period you select, this graph shows all work orders that are due, whether they are scheduled work orders, unscheduled work orders or service requests. Frequent viewing of this graph alerts you to excessive unscheduled maintenance or service requests.

Cost Center Total Downtime: Charts each cost center's total downtime. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Cost Center Average Downtime: Shows each cost center's average downtime. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Cost Center Downtime Comparison: Compares each cost center's total downtime, average downtime and total number of work orders. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Asset Type Total Downtime: Shows total downtime for each asset type. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Asset Type Average Downtime: Shows average downtime for each asset type. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Asset Type Downtime Comparison: Compares total downtime for each asset type, average downtime and total number of work orders. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Work Order Cause Total Downtime: Shows total downtime for each work order cause. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Work Order Cause Average Downtime: Shows average downtime for each work order cause. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Work Order Cause Downtime Comparison: Compares total downtime for each work order cause, average downtime and total number of work orders. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Technician Total Downtime: Shows total downtime for each technician. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Technician Average Downtime: Average downtime for each technician. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Technician Downtime Comparison: Compares total downtime for each technician, average downtime and total number of work orders. You can filter by date range, asset or task ID, type, cause, asset description, location, technician, emergency work order status and scheduled and/or unscheduled status.

Work Order Scheduled vs. Unscheduled: Compare scheduled work orders and unscheduled work orders by asset. The graph on the left shows the total quantity of work orders; the graph on the right shows work orders by percentage. Each asset is represented by its own set of graphs. Use the record navigation bar to advance through the graph sets.

Staff Graphs

Employee Performance: Compares the amount of time that different employees spent on the same task during the same time period. You can also compare how much time the same task took for different assets. Compare emergency work order time by asset ID, task ID or employee.

Craft Performance: Shows craft performance comparisons for a period of time.

Employee Performance Comparison: Use this graph to compare employee performance; generate graphs for more than one employee for the same asset ID, task ID and time frame.

Part Graphs

Inventory Value by Category: Compares the inventory value of part categories. Filter to graph a single category or leave the filter blank to look at all categories. Ten categories are shown per graph; advance through all graphs using the record navigation bar.

Purchase Orders by Supplier: Compare the costs of received and backordered parts for a particular period of time. You can compare parts purchased during the current and previous months or during the same month one year ago. You can choose to see only received parts, parts you haven't received or both. FaciliWorks creates a separate graph for each supplier.

Purchase Orders by Part: Shows information about a particular part that is supplied by more than one supplier. You can compare current and previous costs for the same part for different time periods to determine cyclical requirements, increased usage or increased cost. Frequent use of this graph can alert you to excessive backorders that can affect your business. Each part has its own graph showing the amount spent on each part during the time indicated. You can filter the data by Ordered By or Approved By criteria, by supplier code or by parts received.

Variable Graphs

Variable History by Task: Shows the history of a selected variable; a separate graph is generated for each asset and each task. You can then see asset trends and predict when readings will be out of tolerance.

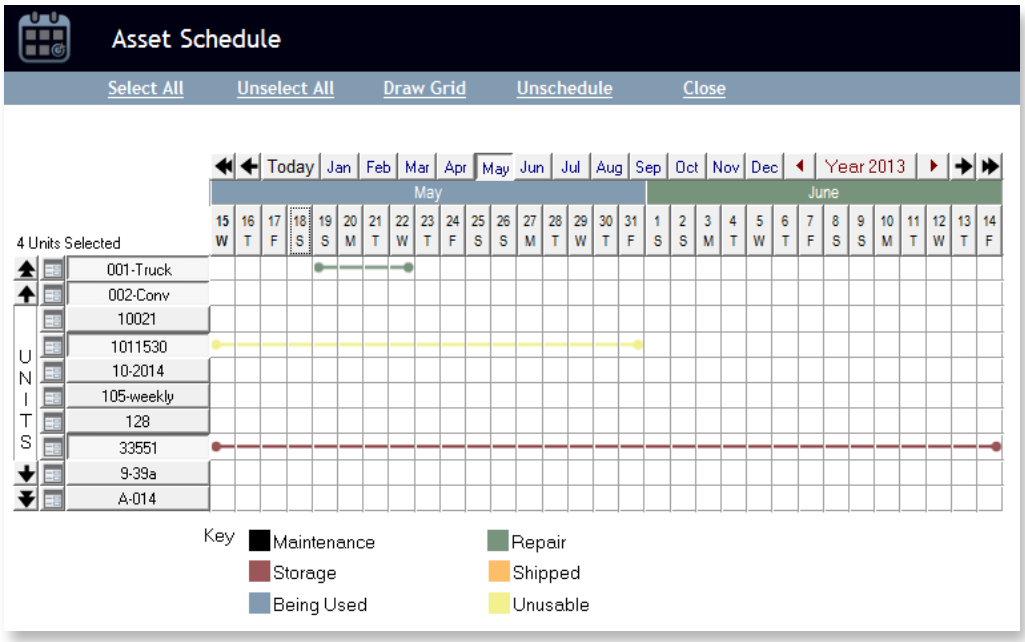
Variable History by Variable: Use this graph to track the history of a selected variable as it applies to all assets and tasks. You can see trends and overall reliability and decide if changes need to be made to improve reliability.

Chapter Twelve:
Dashboard Analytics

From the main menu, select **Dashboard Analytics**.

Asset Schedule

In this form, you can create a customized schedule of asset maintenance, usage and availability, marking an asset as scheduled for usage, storage, shipping or repair.



The **Asset ID** for each asset in your FaciliWorks database is displayed as a button on the left-hand side of this screen. Click on the button of each **Asset ID** you wish to schedule; you can select several assets at a time, if desired. To unselect an **Asset ID**, click its button again. Use the scrolling arrows at the left of the screen to view more **Asset IDs**; the single arrows advance the display up or down one **Asset ID** at a time, while the double arrows advance the display up or down a whole screen at a time.

To select all **Asset IDs**, click the **Select All** button at the top of the form; to unselect all **Asset IDs**, click the **Unselect All** button.

Note: Once selected, **Asset IDs** remain selected until you click their buttons to unselect them, or click the **Unselect All** button. You cannot unselect an **Asset ID** by clicking the button of another **Asset ID**.

Once you've selected the **Asset IDs** you want to schedule, you can select a date or date range. By default, the current date is the first date shown in the **Asset Schedule** screen; if you need to select a date outside the range of visible dates, you can use the scrolling arrows at the top of the screen to advance the visible dates backward or forward a day or a screen at a time. You can also click the name of a month to display that month (beginning with the current day of the month). The year shown in the schedule is displayed in red in the upper right-hand corner of the screen next to the scrolling arrows. To advance backward or forward to a different year, click the red triangles on either side of the year display. To return to today, click the **Today** button next to the scrolling arrows on the left.

To select a date, click the desired date button under the colored month bar. FaciliWorks will display the selected date at the top of the screen. To select a range of dates, click on the button for the first date included in the date range, then click on the button for the last date included. Again, FaciliWorks displays the selected range of dates at the top of the screen. As with **Asset IDs**, you must click a date a second time to deselect it.

When you have selected the **Asset IDs** you wish to schedule and an appropriate date or date range, you can click a status button below the schedule grid to display the appropriate status during the time selected. The status options available are Maintenance, Storage, Being Used, Repair, Shipped or Unusable.

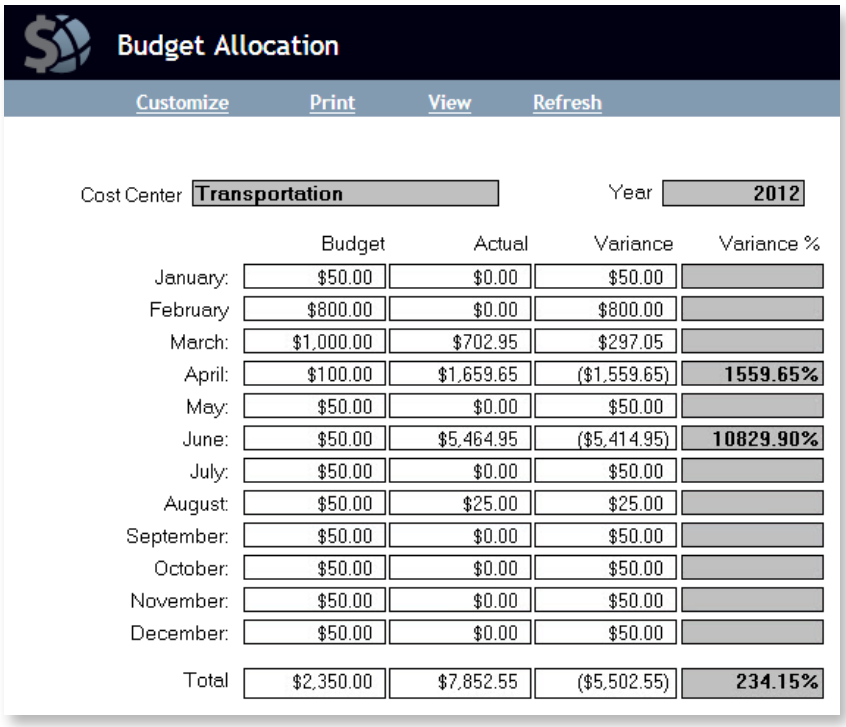
The **Draw Grid** button redraws the visible area of the **Asset Schedule Grid** after you have scrolled to a different part of the grid. The **Unschedule** button removes scheduling information for the selected asset over the selected date range. The **Close** button closes the **Asset Schedule** screen.

Budget Allocation

As maintenance manager, you are responsible for budget and resource planning. FaciliWorks' powerful tools help you plan ahead. To obtain a historical perspective, e.g., for the most recent quarter and for the same quarter in the previous year, you print the **Work Order Costs and Labor** report several times, sorting by assets, tasks, locations and technicians, so that you can better analyze past use of resources.

Using FaciliWorks' **Budget Allocation** feature, you check your budget for each of the three months of the most recent quarter and the same quarter in the previous year, comparing actual and estimated costs. FaciliWorks flags over-budget months so that you can easily recognize them.

Use FaciliWorks' **Budget Allocation** feature to compare estimated maintenance costs with actual costs. To access this feature, select **Budget Allocation** from the **Dashboard Analytics** menu.



Budget Allocation

Customize Print View Refresh

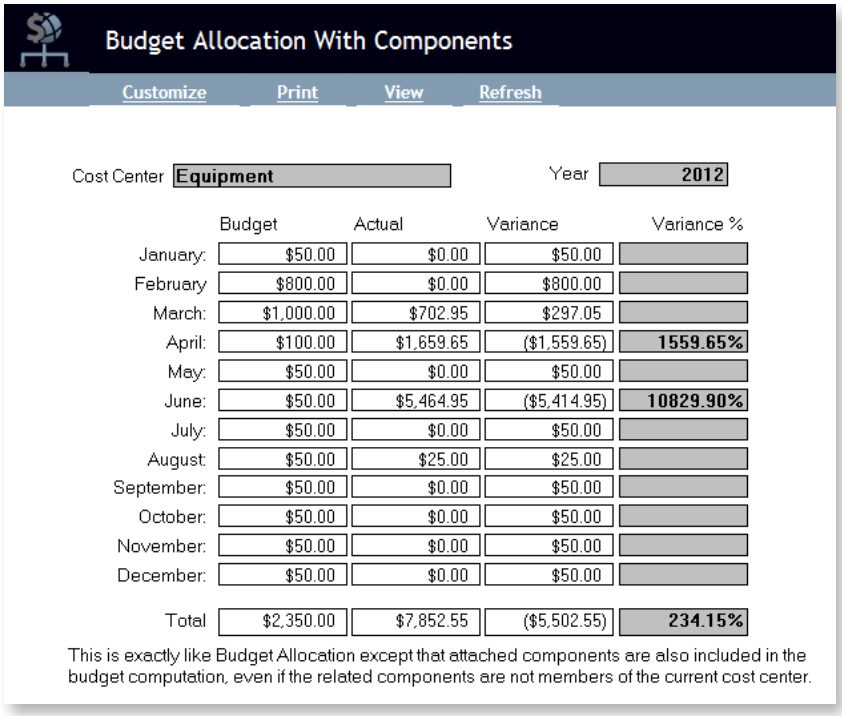
Cost Center: Transportation Year: 2012

	Budget	Actual	Variance	Variance %
January:	$50.00	$0.00	$50.00	
February	$800.00	$0.00	$800.00	
March:	$1,000.00	$702.95	$297.05	
April:	$100.00	$1,659.65	($1,559.65)	1559.65%
May:	$50.00	$0.00	$50.00	
June:	$50.00	$5,464.95	($5,414.95)	10829.90%
July:	$50.00	$0.00	$50.00	
August:	$50.00	$25.00	$25.00	
September:	$50.00	$0.00	$50.00	
October:	$50.00	$0.00	$50.00	
November:	$50.00	$0.00	$50.00	
December:	$50.00	$0.00	$50.00	
Total	$2,350.00	$7,852.55	($5,502.55)	234.15%

Set up a separate budget for each of your cost centers. Then, to compare costs, select or enter the cost center and year for which you wish to see data. After you edit the estimated costs for a cost center, use the **Refresh** button to recalculate the difference between estimated and actual costs. Whenever the actual cost exceeds the estimated cost, the program will flag the month as **Over Budget**.

Budget Allocation with Components

This form is like the **Budget Allocation** form except that attached components are also included in the budget computation, even if the related components are not members of the current cost center.



Budget Allocation With Components

Customize Print View Refresh

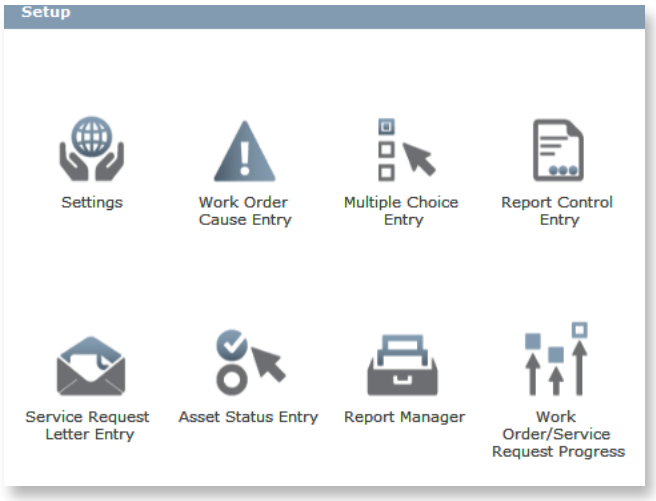
Cost Center **Equipment** Year **2012**

	Budget	Actual	Variance	Variance %
January:	$50.00	$0.00	$50.00	
February	$800.00	$0.00	$800.00	
March:	$1,000.00	$702.95	$297.05	
April:	$100.00	$1,659.65	($1,559.65)	**1559.65%**
May:	$50.00	$0.00	$50.00	
June:	$50.00	$5,464.95	($5,414.95)	**10829.90%**
July:	$50.00	$0.00	$50.00	
August:	$50.00	$25.00	$25.00	
September:	$50.00	$0.00	$50.00	
October:	$50.00	$0.00	$50.00	
November:	$50.00	$0.00	$50.00	
December:	$50.00	$0.00	$50.00	
Total	$2,350.00	$7,852.55	($5,502.55)	**234.15%**

This is exactly like Budget Allocation except that attached components are also included in the budget computation, even if the related components are not members of the current cost center.

Chapter Thirteen:
Program Setup

The **Setup** menu is used to set your program preferences, enter company information and describe pre-defined drop-down lists that are used by FaciliWorks. To access the **Setup** menu, you must have administrative permissions or have been given permission by the administrator through security settings. From the Main Menu, click **Setup**.



Settings

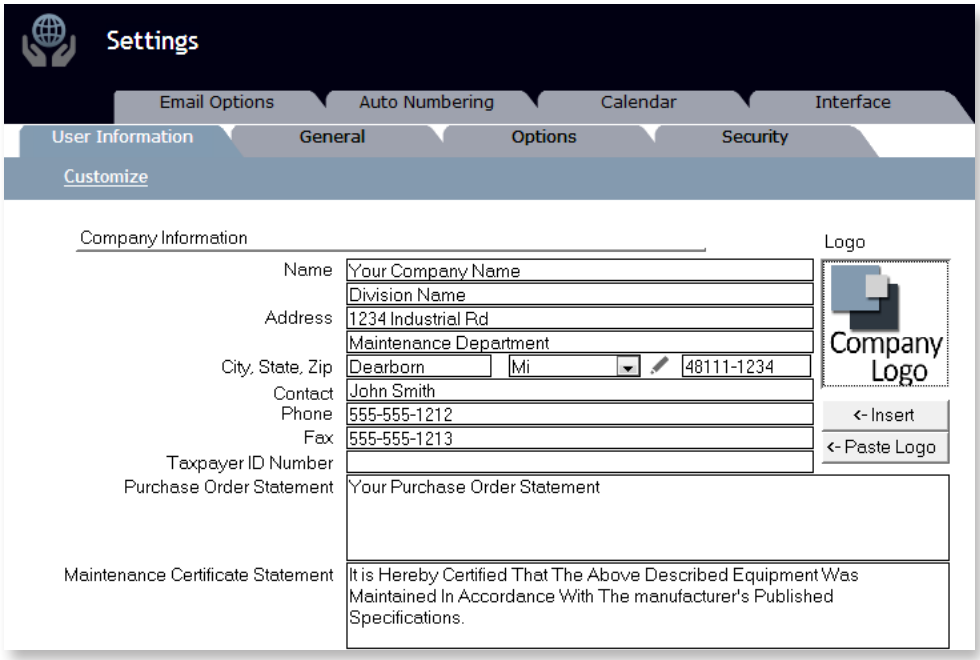
Use the **Settings** utility to:

- Enter your company information and logo
- Select your work order options and skip dates
- Enter your maintenance certificate statement
- Customize the appearance of FaciliWorks including labels, tabs, forms, menu buttons and icons
- Enter your purchase order statement
- Enable security and set password specifications
- Set service request options and email notification information
- Identify inventory costing methods
- Enable the audit trail
- Enable and set preferences for Automatic Numbering for work orders, purchase orders, requisitions, assets and service requests
- Set tax rates for purchase orders
- Enter your calendar refresh schedule
- Choose your calendar color-coding

Settings – User Information Tab

From the Main Menu, navigate to the **Setup -> Settings -> User Information** tab. The **User Information** tab captures company information that will be used on all reports, work orders and purchase orders. Use the **Customize** button to modify the form labels and font weight of any form labels.

Enter your company name, address, phone number, logo, etc. The address entered here will be used as the bill-to address for purchase orders created within FaciliWorks; however, the address can be modified for any purchase order within the **Edit Purchase Orders -> Bill To** tab. The two lines for company name and the optional logo will appear at the top of all of your reports.



Click the **<- Insert** button to browse to and select your company logo. FaciliWorks supports BMP, GIF, TIF and JPG images. For best results, we recommend that you paste your logo into FaciliWorks as a .BMP, regardless of how it was originally created. Ideally, the logo graphic you insert or paste should be no larger than the space provided (about 1" square) and use no more than 8-bit color (256 colors). Larger graphics using higher color resolution may use system resources unnecessarily. This may slow down report printing or prevent your logo from being printed at all. If your logo does not fit into this area, use Adobe Photoshop or a similar program to modify your image before placing it here (trying to modify the size of the logo after it is placed here will distort the image).

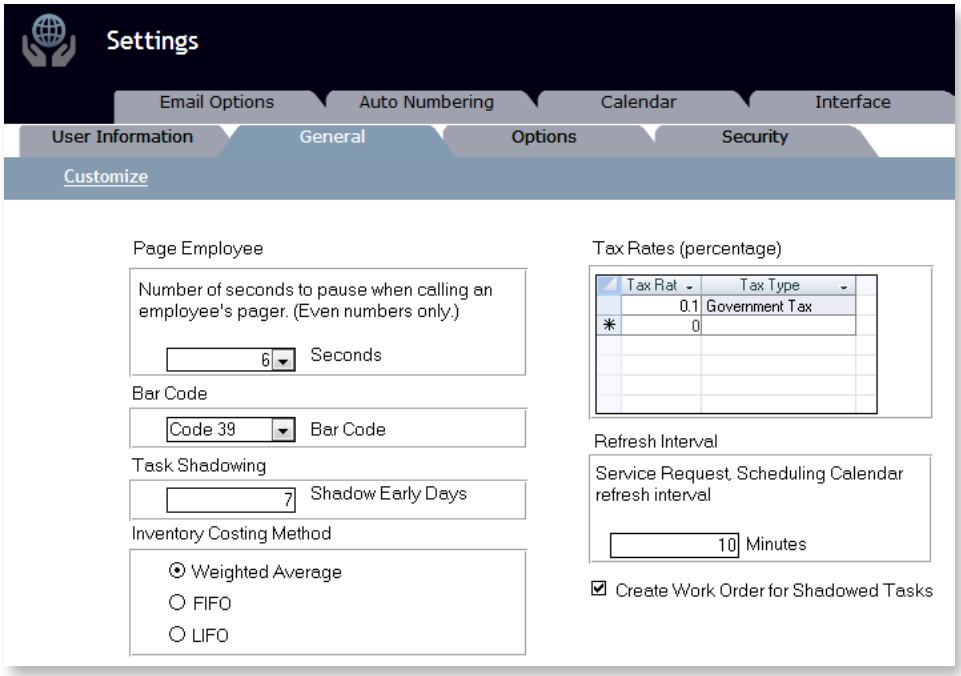
Enter the **Taxpayer ID Number**; it will appear on your purchase orders.

The **Purchase Order Statement** contains information or instructions that will appear on your purchase orders. The field contains a scroll bar and expands for your needs.

The **Maintenance Certificate Statement** text populates into the **Maintenance Statement** field of a completed work order. This statement might be required to satisfy asset warranties. The field contains a scroll bar and expands for your needs.

Settings – General Tab

The **General** tab captures tax information, inventory costing method and bar coding selection.



Page Employee: FaciliWorks works with an AT compatible modem. If you have difficulty paging your employees, it could be because you don't have a long enough pause between the dialing of the pager number, the answering of the pager by the service provider and the automatic sending of the number for the employee to call. We suggest that you begin with a six-second delay. You can later increase or decrease this pause as needed.

Bar Code: Code 39 contains capital letters and numbers; Code 128 contains letters, numbers, control characters and some symbols. After you select the bar code format, FaciliWorks prompts you to run the **Find Uncodeable Records** utility.

Task Shadowing: Indicate the maximum number of days between completing a shadowing task and completing the shadowed task.

Inventory Costing: Indicate the inventory costing method your accounting department uses.

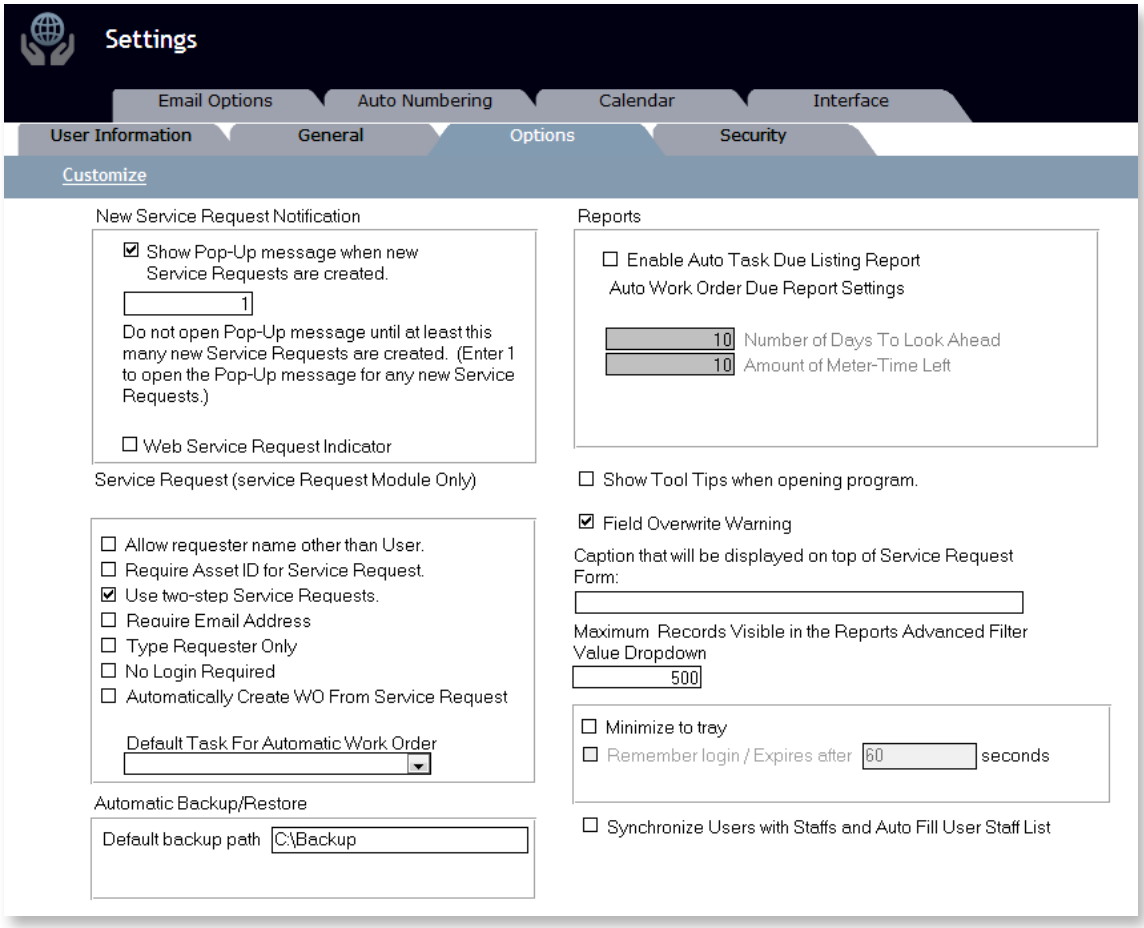
Tax Rates: Enter the tax percentages and types that may apply to your purchases.

Refresh Interval: Enter a time period in minutes. When you open the Calendar, the program will automatically update the data according to this interval.

Create Work Order for Shadowed Tasks: Check this checkbox if you want FaciliWorks to generate a separate work order for a task that is covered by a shadowing task.

Settings – Options Tab

Set service request and report auto-generation options in the **Options** tab.


Settings
Email Options
Auto Numbering
Calendar
Interface
User Information
General
Options
Security
Customize
New Service Request Notification
Show Pop-Up message when new Service Requests are created.
1
Do not open Pop-Up message until at least this many new Service Requests are created. (Enter 1 to open the Pop-Up message for any new Service Requests.)
Web Service Request Indicator
Service Request (service Request Module Only)
Allow requester name other than User.
Require Asset ID for Service Request.
Use two-step Service Requests.
Require Email Address
Type Requester Only
No Login Required
Automatically Create WO From Service Request
Default Task For Automatic Work Order
Automatic Backup/Restore
Default backup path
C:\Backup
Reports
Enable Auto Task Due Listing Report
Auto Work Order Due Report Settings
10
Number of Days To Look Ahead
10
Amount of Meter-Time Left
Show Tool Tips when opening program.
Field Overwrite Warning
Caption that will be displayed on top of Service Request Form:
Maximum Records Visible in the Reports Advanced Filter Value Dropdown
500
Minimize to tray
Remember login / Expires after
60
seconds
Synchronize Users with Staffs and Auto Fill User Staff List

New Service Request Notification

For FaciliWorks to alert you when users enter new service requests, place a check in the **Show Pop-up Message when new Service Requests are created** checkbox, then enter the number of service requests that should be entered before you receive notification.

Service Request (Service Request Module only)

Allow requester name other than user: Users can enter service requester names other than their own when submitting a service request.

Require Asset ID for Service Request: Choose whether or not a user must reference an **Asset ID** with every service request.

Use two-step Service Requests: Requires that service requests be manually approved in order to be made into work orders.

Require Email Address: Requires a requester to submit an email address with a service request.

Type Requester Only: Disables the drop-down list of requester names in the **Service Request Module**, so users must type their names into the name field whenever they submit service requests.

No Login Required: Users can submit service requests without logging in. This option is grayed out if you've installed the 21 CFR Part 11 compliant version of FaciliWorks which requires login.

Automatically Create WO from Service Request: Allows you to create a work order from a service request without the request having to go through the approval process. If this box is checked, select a task from the **Default Task for Automatic Work Order** drop-down list. Once you choose a task and go to **Service Requests -> Create Service Requests**, the **Task ID** field is automatically filled; complete the information on the screen and click **Create WO**.

Automatic Backup/Restore

Enter the path for your data backup.

Reports

Enable Auto Task Due Listing Report: When you launch FaciliWorks, a **Task Due Listing** report (in preview mode) will automatically pop up when this box is checked. This report shows **Asset IDs** that are due or past due for maintenance. You can print the report or close it to continue into FaciliWorks. If you have no due or past due tasks, a dialog box will pop up to inform you that no assets are due for maintenance.

Auto Work Order Due Report Settings: These two fields allow you to determine the criteria for the **Auto Task Due Listing** report. **Number of Days to Look Ahead** determines how far ahead the report will search for date-based maintenance (for example, if you enter 7, an asset doesn't appear on the report until the maintenance due date is a week or less away). **Amount of Meter-Time Left** determines how much usage an asset should have left before it appears on the report (for example, if you enter 10, an asset doesn't appear on the report until its current meter usage is ten units less than the meter value at which maintenance is due).

Other Options

Show Tool Tips when opening program: Check this box if you want to see a different usage tip each time you launch FaciliWorks. This is a convenient way to learn more about the software. Checking this checkbox is equivalent to going to the **Ribbon -> Help tab -> Tip of the Day** and checking the **Show this form the next time the application is opened** checkbox.

Field Overwrite Warning: If this box is checked and a user tries to modify an existing key field (such as **Asset ID** or **Task ID**), a dialog box will warn the user that they are about to change a key field.

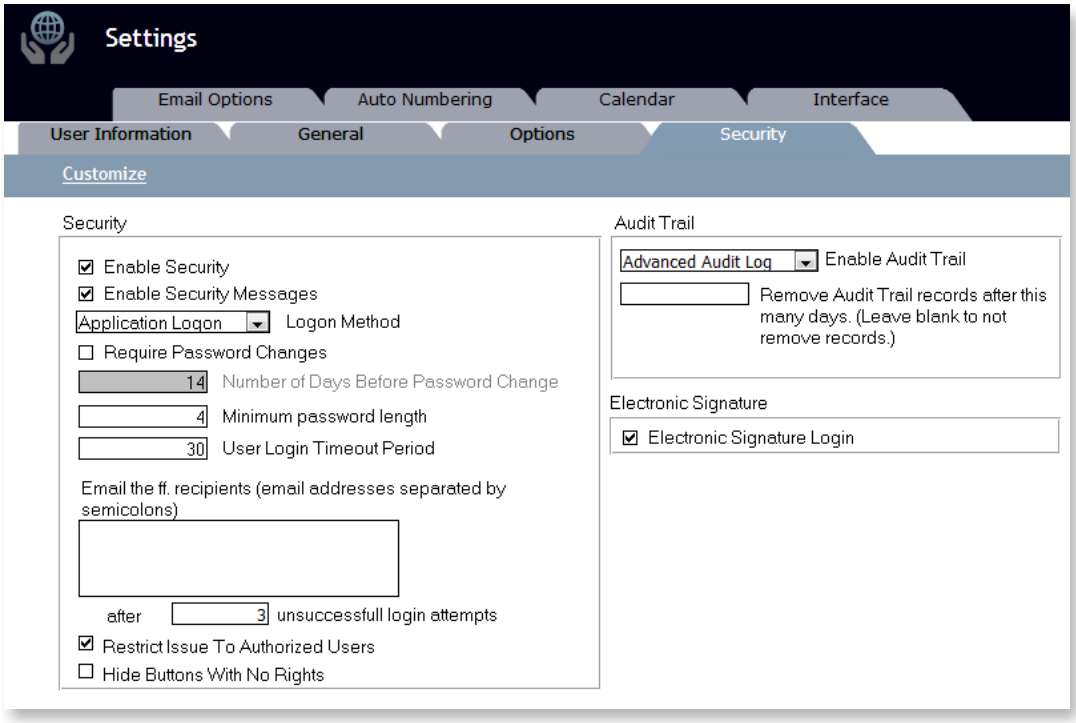
Caption that will be displayed on top of Service Request Form: Type in the caption to be displayed on the **Create Service Request** form.

Max Records Visible in the Reports Advanced Filter Value Drop-down: When using the advanced filter on reports, display this quantity of records in the **Value** drop-down list.

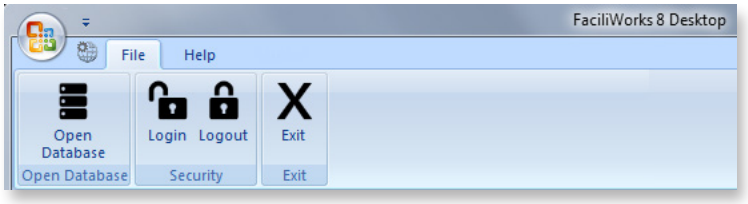
Sync Users with Staff and Auto-fill User Staff List: When creating **Users** in the **Security** form under the **Personnel** menu, automatically synchronize the **User** with a staff record if a staff record for that user is present in the database.

Settings – Security Tab

Set security and audit trail options in the **Security** form.

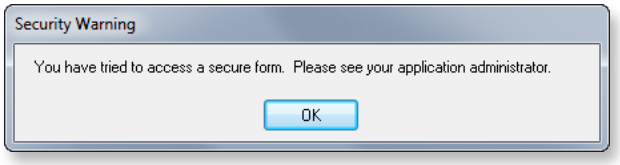


To enable security, check the **Enable Security** checkbox. This box must be checked before requiring users to login to the program; the **Login** button under the **File** tab on the ribbon will not be active unless security is enabled.



Security cannot be enabled until you have at least one administrative user in the program; this will prevent you from being locked out of the system as only the Administrator has access to this form under the **Settings** submenu. All users and permissions should be set from within **Personnel -> Security** before enabling security.

Once users have been created and permissions have been set, users who do not have access to certain areas of the software will be shown this message if the **Enable Security Messages** box has been checked:



Logon Method: You can choose from two types of system security:

- Windows Logon – uses security from your Windows operating system; when users log in to Windows, they can access FaciliWorks.
- Application Logon – uses security specific to the FaciliWorks program; you must set up user IDs and passwords in the **Security** form.

Require Password Changes: Check this box to require users to change their logon passwords at intervals chosen by the administrator. When this option is selected, you may choose any number of days for this interval. The default interval is 14 days.

Minimum Password Length: The minimum number of characters for user-defined passwords.

User Login Timeout Period: The number of minutes of inactivity FaciliWorks will allow before automatically logging out a user.

Email the ff. recipients: Enter a list of email addresses, separated by semicolons, that will receive an automatic email notification after the number of unsuccessful login attempts set in the **after __ unsuccessful login attempts** field.

Restrict Issue to Authorized Users: Check this box if you want assets to be issued only to authorized users. If you select this option, you cannot override it for individual assets in the **Assets -> Auth. Persons** tab.

Hide Buttons with No Rights: Check this box to hide buttons from users who do not have rights to view forms or perform actions triggered by those buttons. If you leave this box unchecked, users can see those buttons but will receive a warning message when those buttons are clicked.

Audit Trail: To record actions that all users perform in the program, such as record modifications and deletions, check the **Enable Audit Trail** checkbox. The **Audit Trail** lists every action and the user who performed it. Select one of three options:

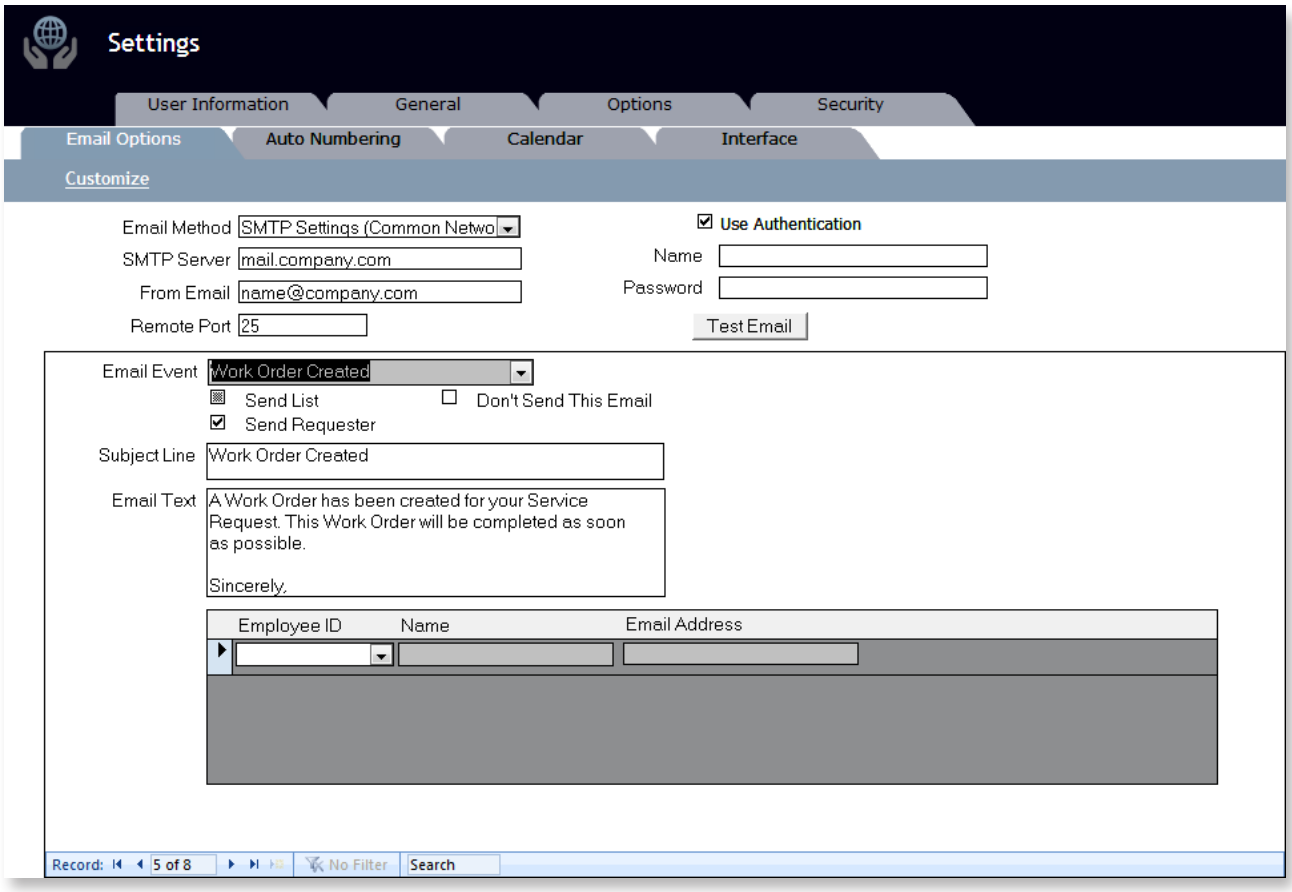
- No Audit Log – disable audit log
- Basic Audit Log – shows values after a change
- Advanced Audit Log (default) – shows values before and after a change. This option is automatically enabled for the 21 CFR Part 11 compliant version of FaciliWorks and cannot be changed.

Remove Audit Trail Records after this many days: Enter the number of days of **Audit Trail** records to keep. FaciliWorks will automatically purge and delete actions older than this value. For example, enter 7 to keep a week of **Audit Trail** data. Enter 0 to keep a comprehensive audit trail record. If you've installed the 21 CFR Part 11 compliant version of FaciliWorks, the **Advanced Audit Log** is automatically enabled and cannot be changed; records are never purged. To see the **Audit Log**, select **Audit Log** from the **Utilities** menu.

Electronic Signature Login: Check this checkbox to require a user to log in before signing a record. This feature is automatically enabled for the 21 CFR Part 11 compliant version of FaciliWorks and cannot be changed.

Settings – Email Options Tab

Set email specifications in the **Email Options** tab. You can choose a standard MAPI client such as Microsoft Outlook or Outlook Express or use SMTP to connect directly to your email server. The automatic email notification is designed to send an email to the person who created the service request and/or to a list of users. A set of emails has been created for various steps in the service request-work order process. This function requires that at least one workstation be running FaciliWorks; this workstation must have a functional MAPI compliant email program installed. The program does not need to be running, but it must be present on the workstation.



Email Method

- MAPI Client: Choose this option to use default email client such as Microsoft Outlook, Outlook Express or any other local email system.
- SMTP (Common Network): Specify your email provider and the program sends the email directly using a specified email sender.
- SMTP (Workstation Specific): Same as above but system registry specific.

From Email: The default email sender. This option is not available if you select MAPI Client.

SMTP Server: The SMTP server used to send and receive emails; this option is not available if you select MAPI Client.

Remote Port: Ask your administrator for this value; this option is not available if you select MAPI Client.

Email Event: These predefined email events cannot be modified, added to or deleted. Specify the settings for the first email event and fill out the remaining fields beneath it. Then, advance to the next email event by using the record navigation bar at the bottom of the **Email Event** pane. These events are defined as follows:

- Service Request Created: This email is automatically sent when a service request is created. The program checks periodically for new service requests. The frequency of the check is based on the **Refresh Interval** defined in the **Setup -> Settings -> General** tab. The created email will be sent no matter how the service request is created.

- Service Request Acknowledged: This is sent to acknowledge a service request. The Acknowledgment is not sent automatically; it can be sent manually from the **Edit Service Request -> Notification** tab.

- Service Request Approved: This email is sent when a service request is approved. The program checks periodically for newly approved service requests. The frequency of the check is based on the **Refresh Interval** defined in the **Setup -> Settings -> General** tab. The approval email will be sent regardless of how the service request was created.

- Service Request Closed: This email is automatically sent immediately upon the closing of a service request without a work order being created.

- Work Order Created: This email is automatically sent when a work order is created from a service request.

- Late Notice: This email is sent when a service request will be delayed or late. Late notification is not an automatic email, it can be sent manually from the **Edit Service Request -> Notification** tab.

- Work Order Completed: This email is automatically sent upon completion of a work order that was created from a service request. This email can also be sent manually from the **Edit Service Request -> Notification** tab.

Send List: Check this checkbox to notify a list of personnel of the service request's status. Select an **Employee ID** from the drop-down list to add that employee to the notification list. Each email event can have a unique list of personnel.

Note: You cannot enter **Employee IDs** manually; they must be selected from the **Employee ID** drop-down list which is drawn from the records created in **Staff Entry**.

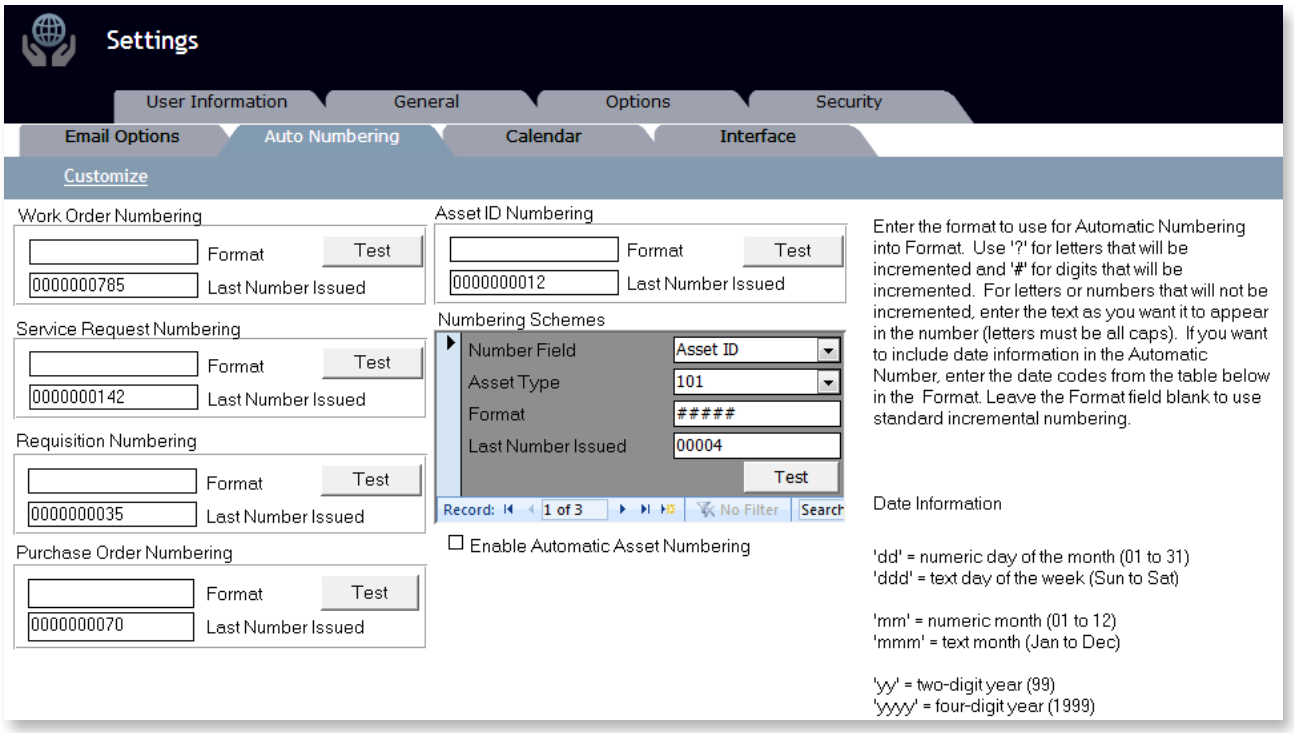
Send Requester: Check this checkbox to notify the requester of the service request's status.

Don't Send This Email: Check this checkbox if you do not want to send emails for this event.

Email Text: Specify the default email content to be sent.

Settings – Auto Numbering Tab

On this form, you can specify the formats to use for your Work Order, Purchase Order, Requisition, Service Request and Asset ID numbers. For your convenience, basic instructions and codes are listed on the right side of this form, including notes about date formats.



Your numbering format can include numbers, letters, dates or any combination of these characters. For example, you can create a work order numbering system that includes the code WO, the day of the week on which the work order is created and a sequential number: WO-ddd-#####. In this case, a sample work order number would be WO-Mon-00014. You can also create a format that uses today's date for the number, such as yyyymmdd##. Then, if you create a work order on May 10, 2012, the first work order number would be 2012051000.

Basic tips for creating your numbering formats:

- Use the # symbol for numbers.
- Use the ? symbol for letters.
- Use the code dd for the date created.
- Use the code ddd for the day of the week created (Monday, Tuesday, etc.).
- Use 20 characters or less in your numbering format; otherwise, the numbers will not fit on your reports.

To start your numbers with A and/or 0, use the # and ? symbols in your format. For example, if you entered PO-???-# # # # # in this form, your first purchase order number would be PO-AAA-00001.

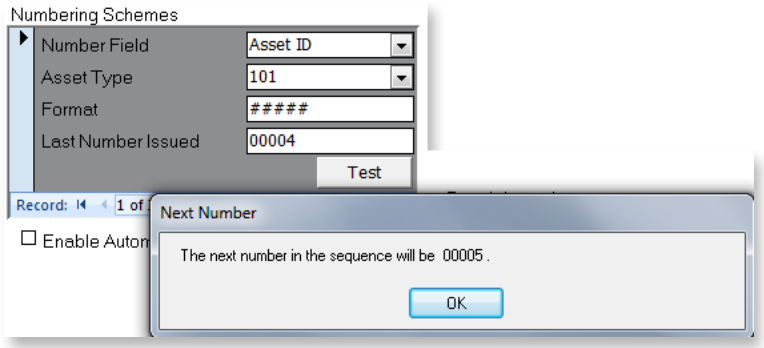
To start your numbers with a specific number and/or letter code, enter the exact code in this screen. For example, if you entered ACW-00002 in this screen, the next number would be ACW-00003.

Click the **Test** button to see a preview of the next number in the sequence, based on the format you created.

Note: Once FaciliWorks creates an automatic number, it will not re-issue that number.

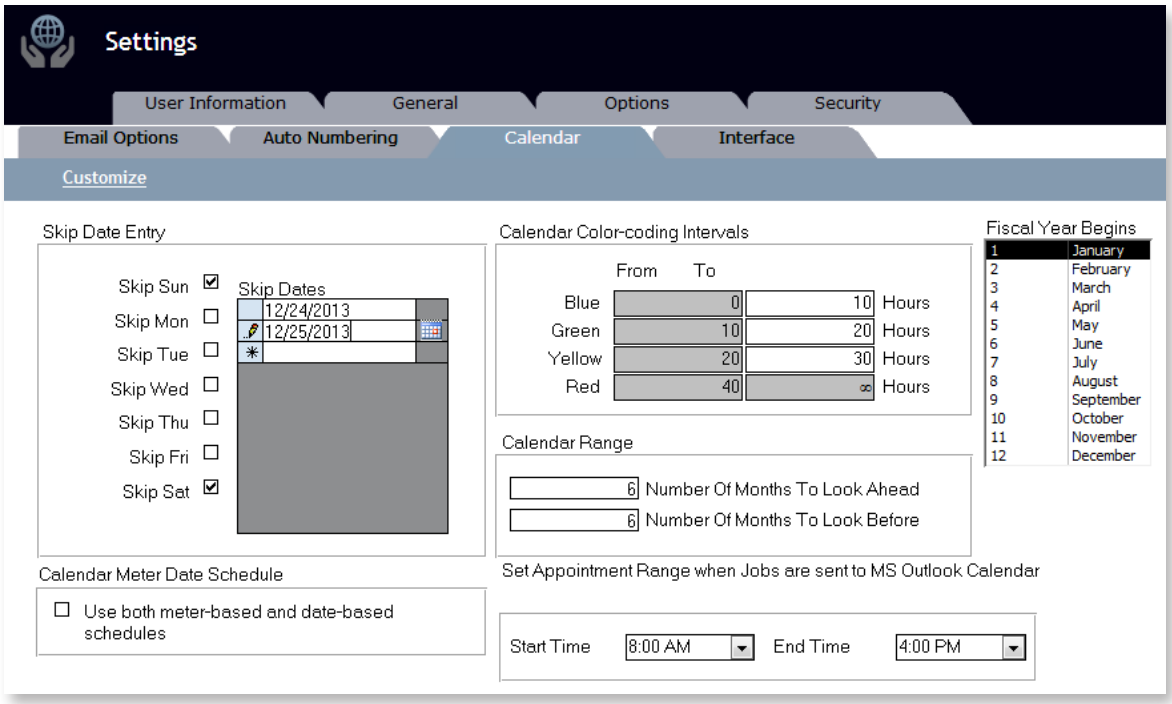
Numbering schemes

Numbering schemes can be formatted for assets, parts and staff records based on type or department. Use the drop-down lists to select number field or type/department. Enter the format in the **Format** field using the format instructions listed on the right side of the form. Be sure to check the **Enable Automatic Asset Numbering** checkbox to activate the **Numbering Schemes**. Clicking the **Test** button will display a message to tell you what the next number in the sequence will be.



Settings – Calendar Tab

The FaciliWorks calendar allows you to define certain dates and days of the week to skip when the program calculates maintenance due dates. Skip dates might include holidays, vacation periods or plant shutdown periods.



Skip Date Entry: To skip certain days of the week such as Saturday or Sunday, click the checkbox next to each day. In the **Skip Dates** pane, you can enter an unlimited number of skip dates. Click in a field to access a pop-up calendar (icon will appear to the right of the active field) from which you can select your skip dates. Skip dates can also be manually entered.

Note: If a calculated maintenance due date falls on any skip day or date, FaciliWorks schedules it for the previous day. However, if you manually enter a maintenance due date, FaciliWorks will not apply your skip dates. Also, the calendar shows assets that have exceeded their meter time as due on the current date, regardless of whether it is a skip date (or day).

When you complete a work order, if the skip days or skip dates would cause the next date due to occur on or before the date on which you performed the work order, then the **Next Date Due** moves to the next available date after the skipped days or dates. For example, if a work order that must be completed once every day (a one-day frequency) is completed on Friday, and Saturday and Sunday are skip days, then the next maintenance falls due on Monday. However, if a work order with a frequency of two or more days is due on a Saturday or Sunday, and those days are skip days, the maintenance will be due on Friday.

Calendar Meter Date Schedule: Check this checkbox to use both meter-based and date-based schedules. If this checkbox is not checked, FaciliWorks uses date-based schedules only.

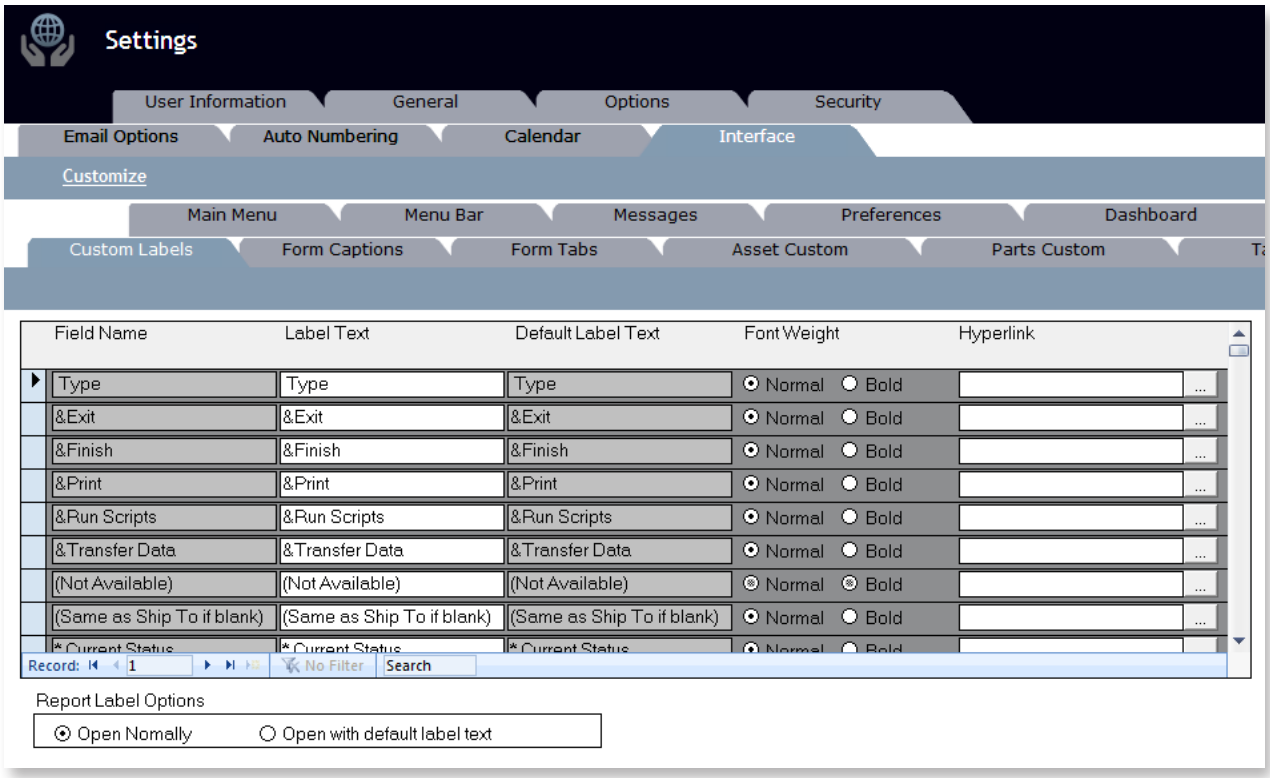
Calendar Color-Coding Intervals: FaciliWorks' scheduling Calendar shows you a quick summary of scheduled maintenance for each day. Entries in the calendar are color-coded by the total number of hours that the maintenance for that day will take. This section allows you to assign the range of time (in hours) to each color. **Note**: You must use blue for your shortest range of time and red for your longest range of time.

Calendar Range: Determine the range of time for the Calendar to display work due. The two fields in this section are **Number of Months to Look Ahead** and **Number of Months to Look Before**. If you want to see only the schedule for the current month, enter 0 in both of these fields (you won't be able to see any previous or future months).

Fiscal Year Begins: Click the name of the month in which your company's fiscal year begins. FaciliWorks uses this information in calculating budgets.

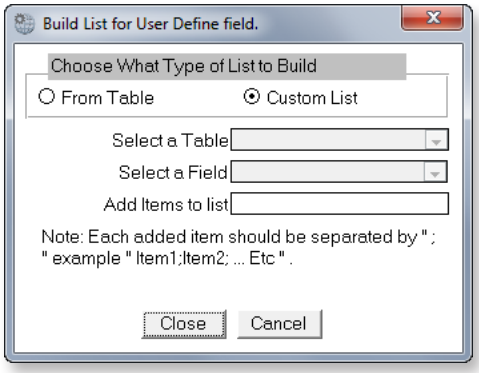
Settings – Interface Tab

Any FaciliWorks field label can be renamed to better suit your needs. For example, your company might use the term **Asset Code** instead of **Asset ID**, so you can change the **Asset ID** field to read **Asset Code**. To change field names, click the **Customize** button found on most forms. To change all other interface items, do so here in the **Setup -> Settings -> Interface** tab.



There are eleven categories that can be customized, each of which corresponds to one of the **Interface** sub-tabs. Within each sub-tab, enter your desired text in the white boxes; the grey boxes are not editable. Click the **Normal** or **Bold** radio buttons to specify font weight.

In the **Asset Custom**, **Parts Custom** and **Task Custom** sub-tabs, you can specify fields as text, date or list fields by using the drop-down lists in the **Field Type** column. These customizations appear in the **User-defined** tabs of **Assets**, **Parts** and **Tasks**, respectively. Upon making a selection, the **Field Attribute** field will change to your specification. If you select **List**, the following window will open, allowing you to enter values for your new drop-down list:


Build List for User Define field.
Choose What Type of List to Build
From Table
Custom List
Select a Table
Select a Field
Add Items to list
Note: Each added item should be separated by " ; "
example " Item1;Item2; ... Etc " .
Close
Cancel

To build your list from an existing table, click the **From Table** radio button, select a table and a field and then close the window. The new drop-down list will contain those values. For instance, selecting the table Equip_Master and the field Equp_ID will populate your new list with Asset IDs.

To build your own custom list, click the **Custom List** radio button and type all desired values in the **Add Items to List** textbox, with items separated only by a semicolon.

Making the field a **Text** field allows you to type anything into that field in the User-defined tab; a **Date** field will display a calendar icon for date selection.

The purpose of each of the **Interface** sub-tabs is explained below:

Custom Labels Sub-tab: All program labels and buttons listed in alphabetical order.

Form Captions Sub-tab: Form titles including report filters, dialog windows and message windows.

Form Tabs Sub-tab: All tab names are customizable here. Select a form name from the drop-down list to display and customize all of the tabs within that form.

Asset Custom Sub-tab: Labels for the user fields under the **Assets -> User Defined** tab. You can specify fields as text, date or list fields.

Parts Custom Sub-tab: Labels for the user fields under the **Part Entry -> User Defined** tab. You can specify fields as text, date or list fields.

Task Custom Sub-tab: Labels for the user fields under the **Tasks -> User Defined** tab. You can specify fields as text, date or list fields.

Main Menu Sub-tab: All menu and submenu labels.

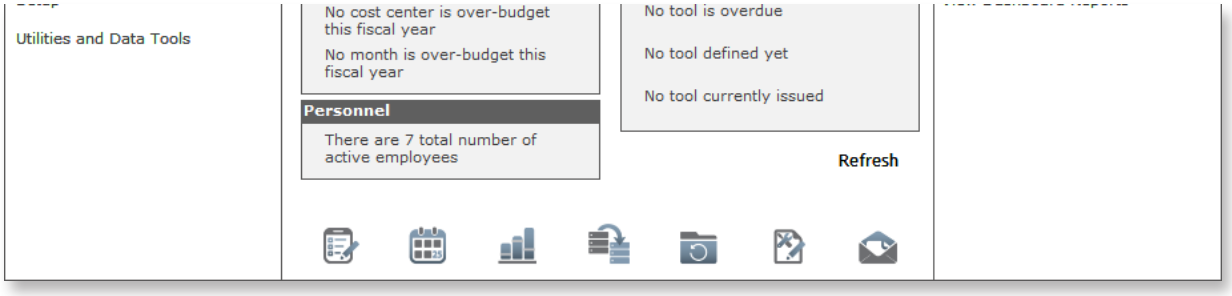
Menu Bar Sub-tab: Labels on the menu bar of the ribbon.

Messages Sub-tab: All warning and security messages found in pop-up windows.

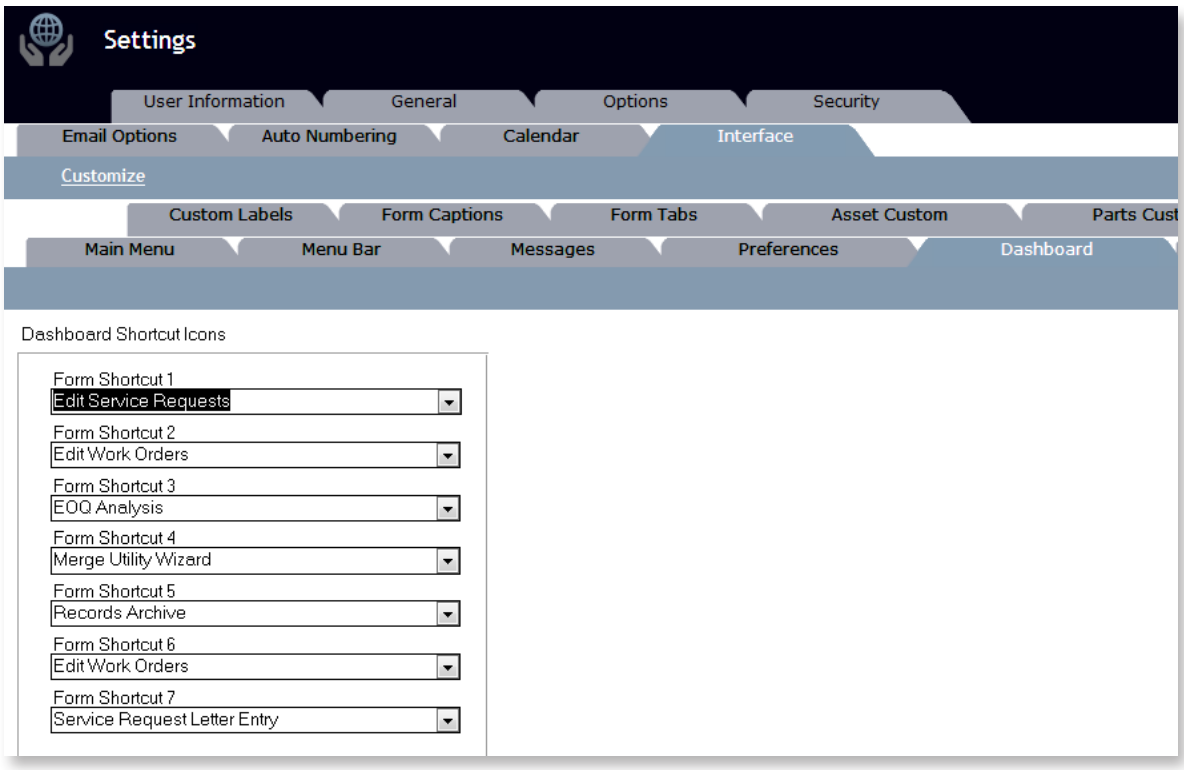
Preferences Sub-tab: Customize the software interface, such as color theme, tab style and menu style.

> Use the drop-down list in the **Theme** pane to select your color preference. Click the **Apply Theme** button. The new color is applied immediately.
>
> To change the tab display on each form, use the drop-down list in the **Tab Style** pane and choose **Single Row**. Click the **Apply Style** button. This change will take effect when you browse to other forms.
>
> The **Menu Style** options include either the ribbon menu or the classic drop-down lists of earlier versions. Make a selection from the drop-down list and then click the **Apply Style** button. You must restart FaciliWorks for this change to take place.

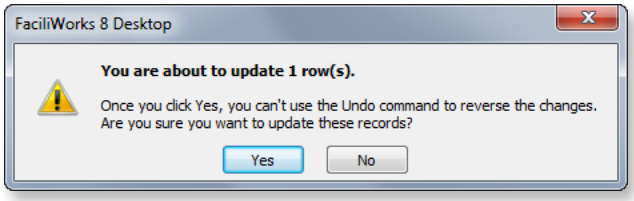
Dashboard Sub-tab: Assume that your day begins by approving service requests and then creating work orders. Your shortcut icon display can be modified to accommodate your preferences. The shortcut icons are the round icons at the bottom of the dashboard:


Utilities and Data Tools
No cost center is over-budget this fiscal year
No month is over-budget this fiscal year
Personnel
There are 7 total number of active employees
No tool is overdue
No tool defined yet
No tool currently issued
Refresh

To customize the shortcut icons, navigate to the **Setup -> Settings -> Interface -> Dashboard** sub-tab. Seven **Form Shortcut** fields with drop-down lists are displayed:



Use the drop-down list in the **Form Shortcut 1** field to select Edit Service Requests. A warning message appears:


FaciliWorks 8 Desktop
You are about to update 1 row(s).
Once you click Yes, you can't use the Undo command to reverse the changes.
Are you sure you want to update these records?
Yes
No

Click **Yes**.

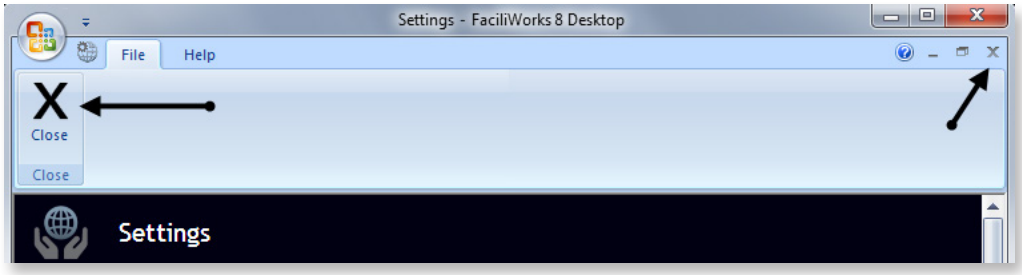
Use the drop-down list in the **Form Shortcut 2** field to select Edit Work Orders. The above warning message appears again; click **Yes**.

Close the **Settings** window to return to the main menu by doing one of the following:

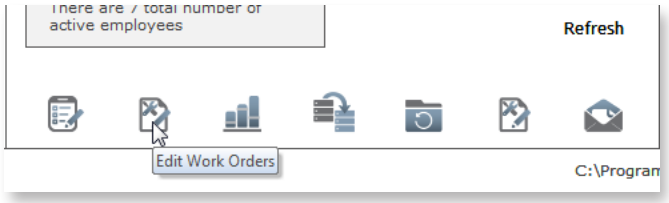
- Click the **Close** button in the **File** menu

  OR

- Click the smaller of the two **X**s in the upper right corner of the window.

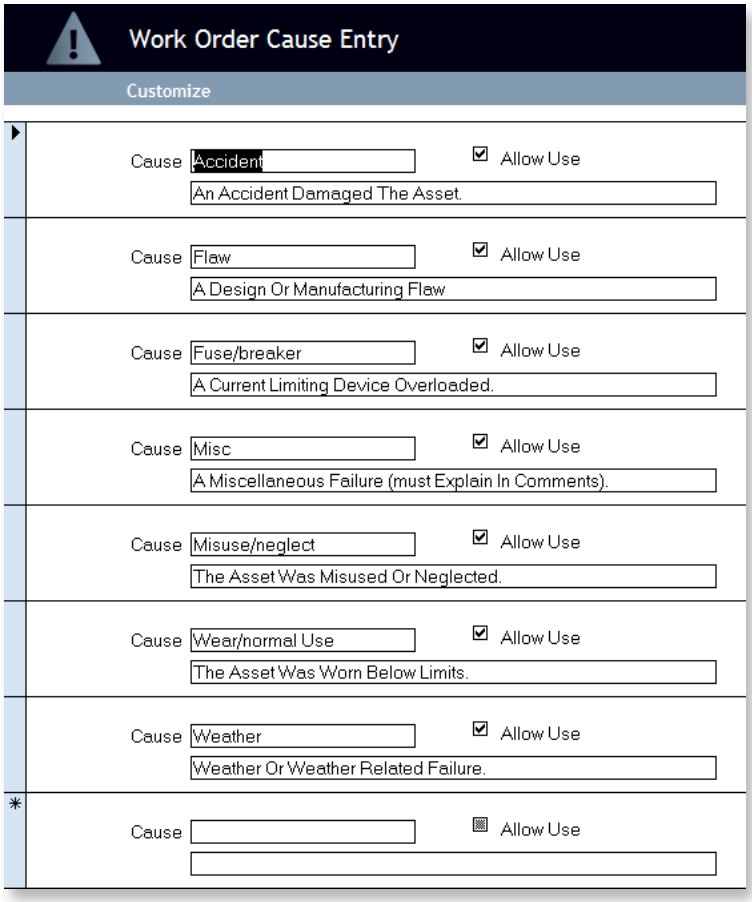


From the main menu, click **Dashboard**. Roll the mouse pointer over the first two shortcut icons. They should reflect your new choices; if not, click **Refresh**.



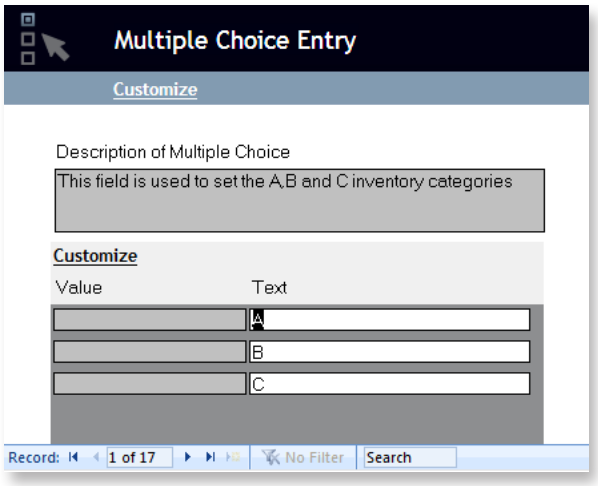
Work Order Cause Entry

On the **Work Order Cause Entry** form, define the drop-down list values for the **Cause** field in **Edit Work Orders** and **Create Unscheduled Work Orders**. FaciliWorks includes seven pre-defined causes which can be edited here. More records can be added to the bottom of this list. To ensure that the list item is included in the drop-down list, check the **Allow Use** box. If you want to temporarily make a particular cause unavailable for selection in the drop-down lists, you can uncheck the **Allow Use** checkbox instead of deleting the record. Use the **Customize** button to modify the form labels and font weight.



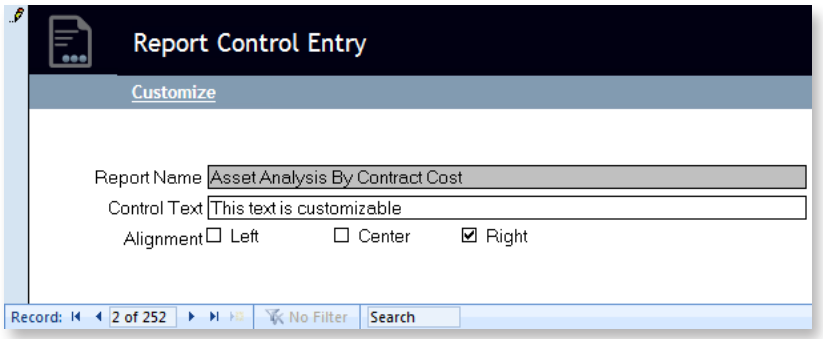
Multiple Choice Entry

The **Multiple Choice Entry** form allows you to set all multiple choice fields in the program. Use the **Record Navigation Bar** at the bottom of the window to move to the next record. The **Description of Multiple Choice** field explains the drop-down list entries. You can enter your own descriptions for these fields, but you cannot change their values (meanings). Use the **Customize** button to modify the form labels and font weight.

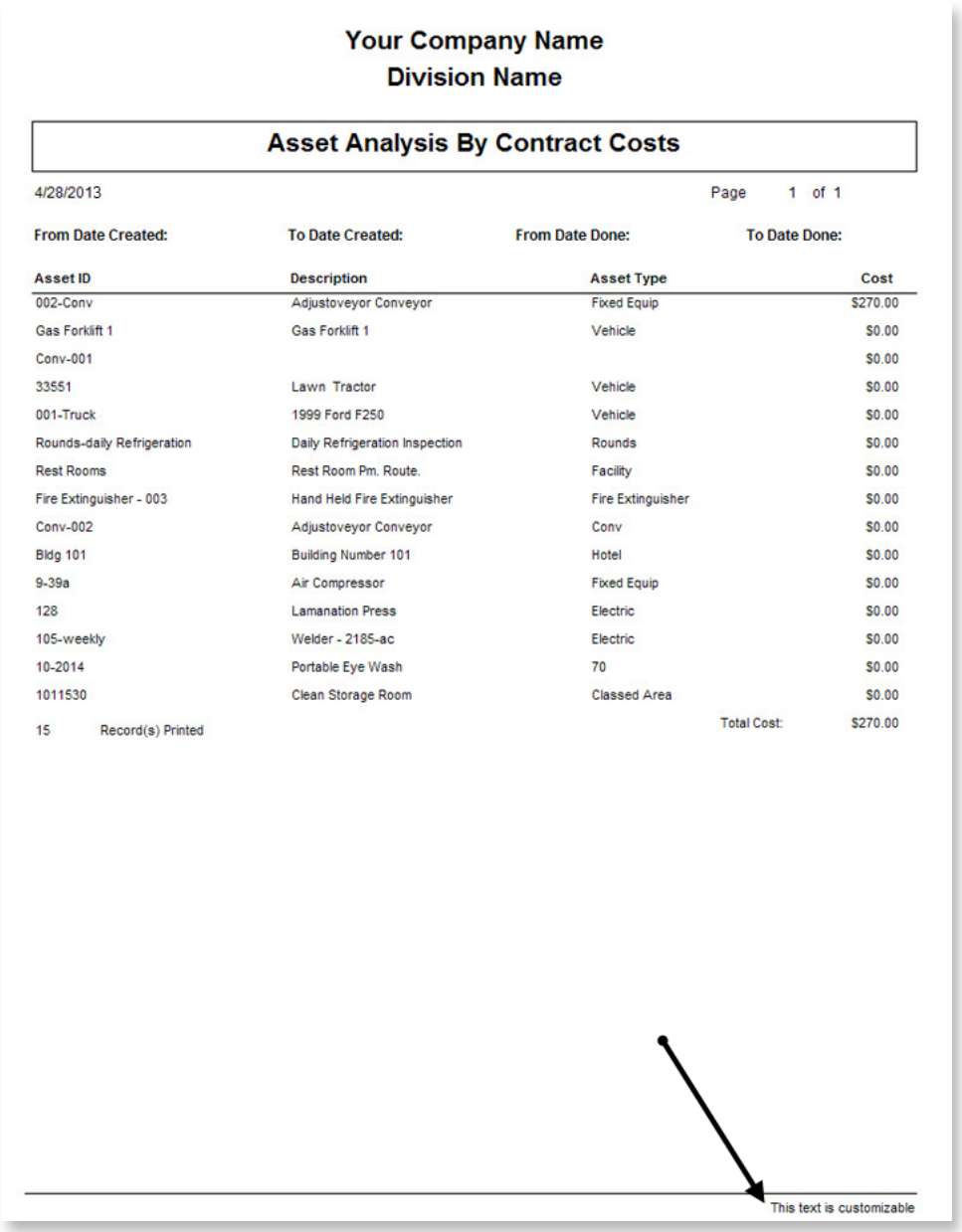


Report Control Entry

If your company must comply with Document Identification and Control requirements, you can set up FaciliWorks to identify each report with a document control number. To use this feature, select **Report Control Entry** from the **Setup** menu and then enter your control text for each report. **Report Control IDs** will appear at the bottom of reports, using the page alignment you have chosen for each report (left, center or right). If you are not required to use a control number, you may enter any other information you want to appear at the bottom of your reports, such as your company address. Use the **Record Navigation Bar** to move to the next record. Use the **Customize** button to modify the form labels and font weight.



The control text appears at the bottom of the report, right justified:



Your Company Name
Division Name

Asset Analysis By Contract Costs

4/28/2013 Page 1 of 1

From Date Created:	To Date Created:	From Date Done:	To Date Done:

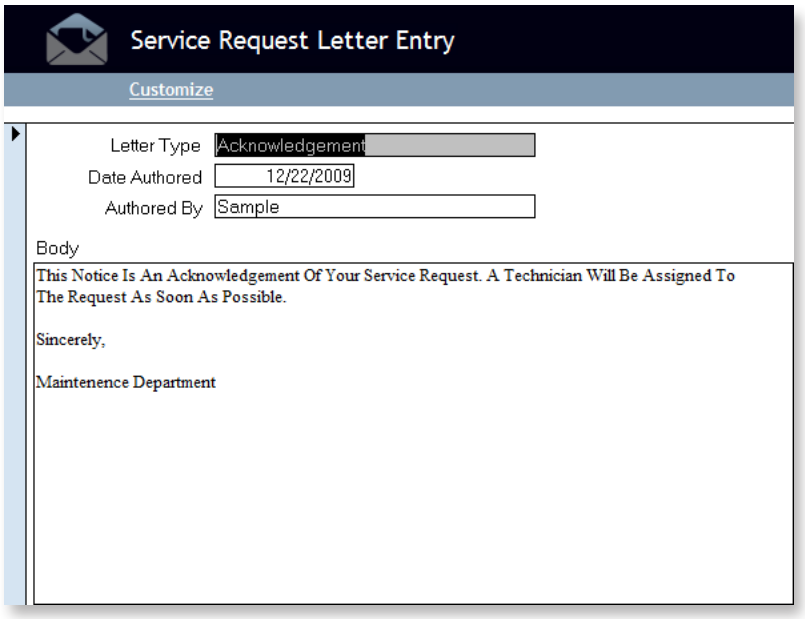
Asset ID	Description	Asset Type	Cost
002-Conv	Adjustoveyor Conveyor	Fixed Equip	$270.00
Gas Forklift 1	Gas Forklift 1	Vehicle	$0.00
Conv-001			$0.00
33551	Lawn Tractor	Vehicle	$0.00
001-Truck	1999 Ford F250	Vehicle	$0.00
Rounds-daily Refrigeration	Daily Refrigeration Inspection	Rounds	$0.00
Rest Rooms	Rest Room Pm. Route.	Facility	$0.00
Fire Extinguisher - 003	Hand Held Fire Extinguisher	Fire Extinguisher	$0.00
Conv-002	Adjustoveyor Conveyor	Conv	$0.00
Bldg 101	Building Number 101	Hotel	$0.00
9-39a	Air Compressor	Fixed Equip	$0.00
128	Lamanation Press	Electric	$0.00
105-weekly	Welder - 2185-ac	Electric	$0.00
10-2014	Portable Eye Wash	70	$0.00
1011530	Clean Storage Room	Classed Area	$0.00

15 Record(s) Printed Total Cost: $270.00

This text is customizable

Service Request Letter Entry

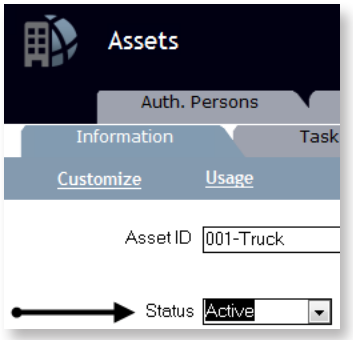
The **Service Request Letter Entry** form allows you to edit pre-defined service request letters. Select this utility from the **Setup** menu. These are the letters that are automatically sent during the service request process, such as to the requester of a service request, depending on your program settings.



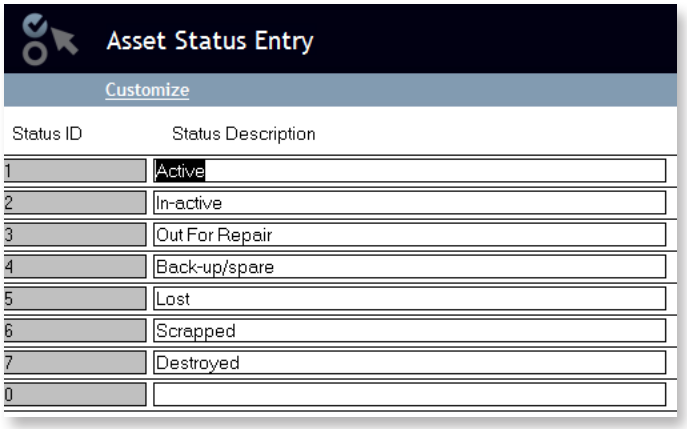
Enter the **Date Authored**, **Authored By** and **Body** of each letter. Use the **Record Navigation Bar** to move to the next record. Use the **Customize** button to modify the form labels and font weight.

Asset Status Entry

Found in the **Assets -> Information** tab, the **Status** field is user-defined; you can assign your own descriptions to each **Status ID** (except for Status 1-Active; see below).



To set up these IDs, navigate to **Setup -> Asset Status Entry**.



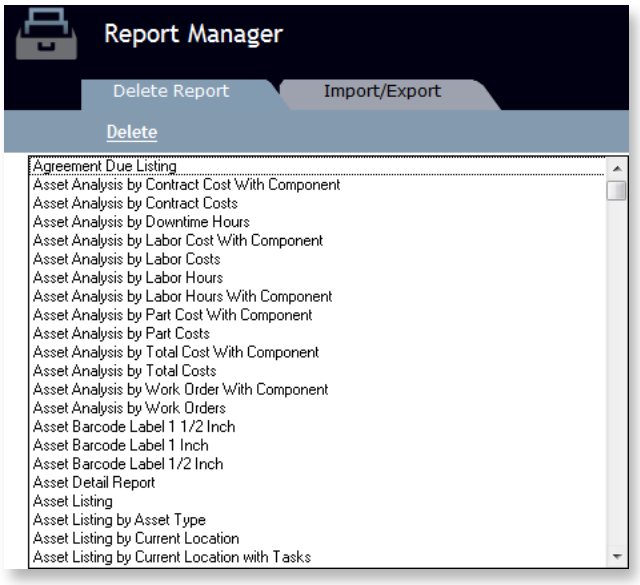
Enter your descriptions in the **Status Description** column. **Status Descriptions** might be Inactive, Out for Repair, Backup/Spare, Lost or Retired. You must use **Status ID 1** for Active assets. The **1** tells FaciliWorks that the asset is currently in use. This means that only assets marked as **Status 1** will appear on lists of assets due for maintenance and on automatic work orders. Therefore, do not modify **Status ID 1** (Active).

Report Manager

FaciliWorks Desktop offers the ability to delete reports, import reports from other compatible databases or export reports. If you need a custom report, please contact us at 1-800-776-3090 to speak with one of our Client Solutions Managers.

Delete Report Tab

To delete a report from your database, navigate to the **Setup -> Report Manager -> Delete Report** tab.


Report Manager
Delete Report
Import/Export
Delete
Agreement Due Listing
Asset Analysis by Contract Cost With Component
Asset Analysis by Contract Costs
Asset Analysis by Downtime Hours
Asset Analysis by Labor Cost With Component
Asset Analysis by Labor Costs
Asset Analysis by Labor Hours
Asset Analysis by Labor Hours With Component
Asset Analysis by Part Cost With Component
Asset Analysis by Part Costs
Asset Analysis by Total Cost With Component
Asset Analysis by Total Costs
Asset Analysis by Work Order With Component
Asset Analysis by Work Orders
Asset Barcode Label 1 1/2 Inch
Asset Barcode Label 1 Inch
Asset Barcode Label 1/2 Inch
Asset Detail Report
Asset Listing
Asset Listing by Asset Type
Asset Listing by Current Location
Asset Listing by Current Location with Tasks

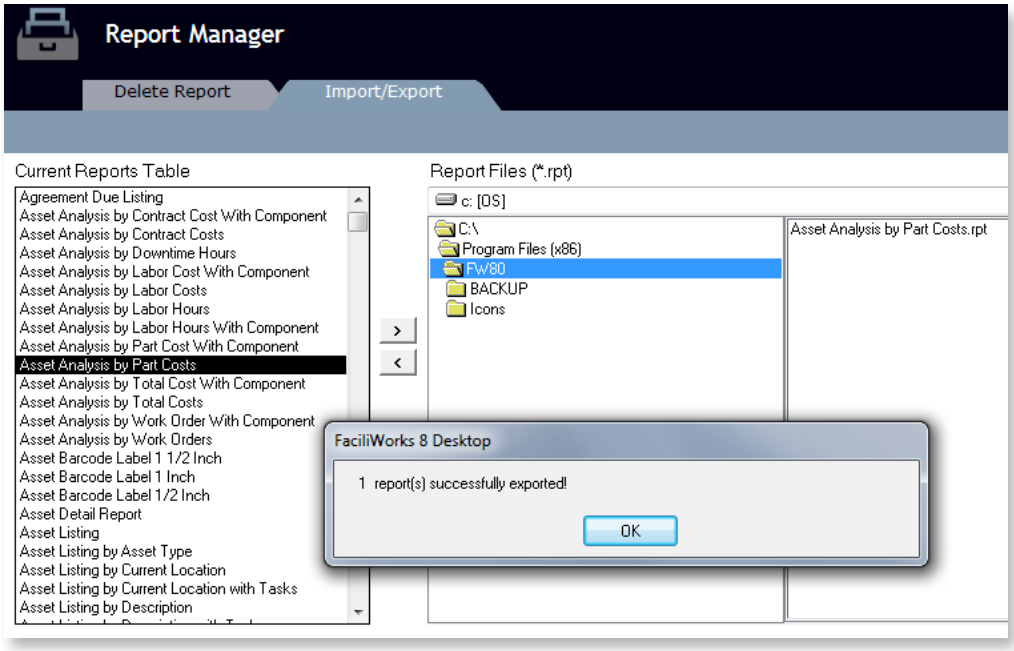
Select the report you want to delete and then click the **Delete Report** button. A confirmation message will appear. Click **Yes** to confirm that you want to delete the report and the report will be deleted from your FaciliWorks database. You cannot undo the deletion of a report.

Import/Export Tab

Navigate to the **Setup -> Report Manager -> Import/Export** tab.

Exporting Reports

This utility allows you import and export reports. FaciliWorks saves encrypted reports in .rpt format. Select the report on the left from the **Current Reports Table** listing. Use the browser on the right to navigate to a destination for the file and then click the add **[>]** button. You will receive a message that the report was successfully exported to the destination. If you select more than one report, each report will be saved as a separate file.

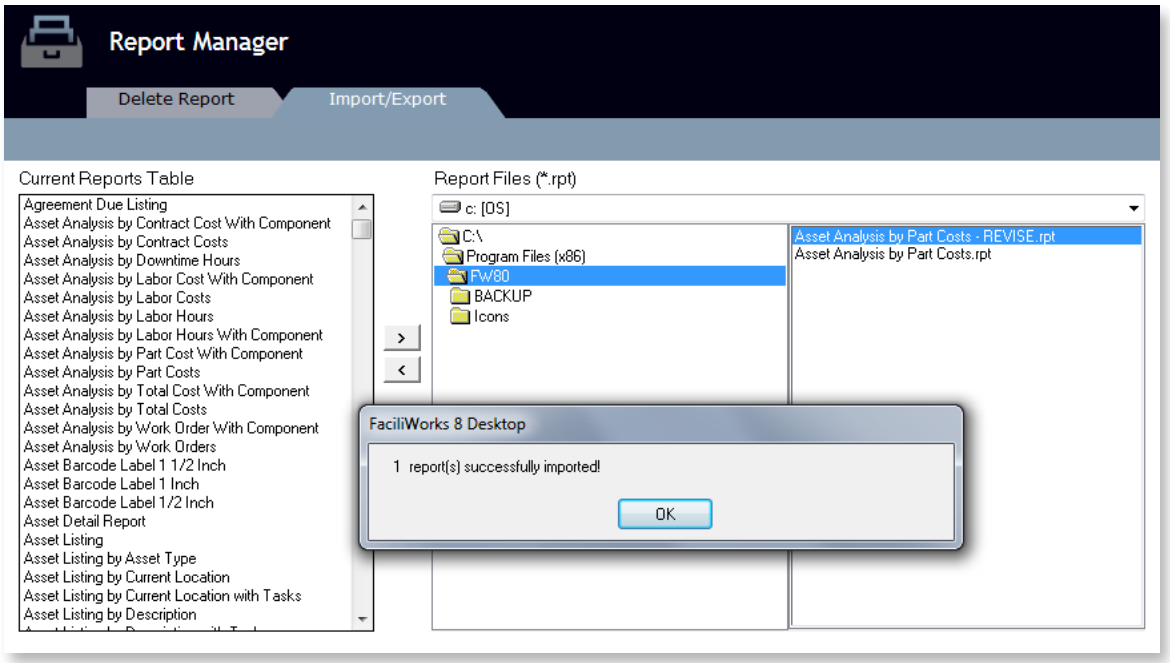

Report Manager
Delete Report
Import/Export
Current Reports Table
Agreement Due Listing
Asset Analysis by Contract Cost With Component
Asset Analysis by Contract Costs
Asset Analysis by Downtime Hours
Asset Analysis by Labor Cost With Component
Asset Analysis by Labor Costs
Asset Analysis by Labor Hours
Asset Analysis by Labor Hours With Component
Asset Analysis by Part Cost With Component
Asset Analysis by Part Costs
Asset Analysis by Total Cost With Component
Asset Analysis by Total Costs
Asset Analysis by Work Order With Component
Asset Analysis by Work Orders
Asset Barcode Label 1 1/2 Inch
Asset Barcode Label 1 Inch
Asset Barcode Label 1/2 Inch
Asset Detail Report
Asset Listing
Asset Listing by Asset Type
Asset Listing by Current Location
Asset Listing by Current Location with Tasks
Asset Listing by Description
Report Files (*.rpt)
c: [OS]
C:\
Program Files (x86)
FW80
BACKUP
Icons
Asset Analysis by Part Costs.rpt
FaciliWorks 8 Desktop
1 report(s) successfully exported!
OK

Exporting to an Existing File

To export to an existing file, select the destination file from the list box on the right before you click on the add **[>]** button to export the file. You cannot export multiple reports to a single file.

Importing Reports

To import reports, use the file browser on the right-hand side of the window to select the report you want to import and then click the **[<]** button. If the report has the same content as one already in the database, you will be asked if you want to overwrite the existing report or rename the report that you're importing. The imported report will then appear in the **Current Reports Table** pane.


Report Manager
Delete Report
Import/Export
Current Reports Table
Agreement Due Listing
Asset Analysis by Contract Cost With Component
Asset Analysis by Contract Costs
Asset Analysis by Downtime Hours
Asset Analysis by Labor Cost With Component
Asset Analysis by Labor Costs
Asset Analysis by Labor Hours
Asset Analysis by Labor Hours With Component
Asset Analysis by Part Cost With Component
Asset Analysis by Part Costs
Asset Analysis by Total Cost With Component
Asset Analysis by Total Costs
Asset Analysis by Work Order With Component
Asset Analysis by Work Orders
Asset Barcode Label 1 1/2 Inch
Asset Barcode Label 1 Inch
Asset Barcode Label 1/2 Inch
Asset Detail Report
Asset Listing
Asset Listing by Asset Type
Asset Listing by Current Location
Asset Listing by Current Location with Tasks
Asset Listing by Description
Report Files (*.rpt)
c: [OS]
C:\
Program Files (x86)
FW80
BACKUP
Icons
Asset Analysis by Part Costs - REVISE.rpt
Asset Analysis by Part Costs.rpt
FaciliWorks 8 Desktop
1 report(s) successfully imported!
OK

Printing Labels

In order to print labels, you must have the FaciliWorks Maintenance Label Kit. The kit comes with a small, high-resolution Brother printer, design software and everything else you'll need to get started.

Printing Asset Bar Code Labels

To print bar-coded asset labels, go to the **Reports & Graphs** menu, select **Asset Reports**, then select **Asset Bar Code Label 1½ Inch**, **Asset Bar Code Label 1 Inch** or **Asset Bar Code Label ½ Inch** and a filter will open. Enter any necessary filter criteria in the filter window or leave all fields blank to view all asset bar codes. Next, click **View** to see a print preview version of your label(s) or click **Print** to print them. Click **Clear Filter** to remove any filter information; click **Close** to return to the reports list.

Printing Part Bar Code Labels

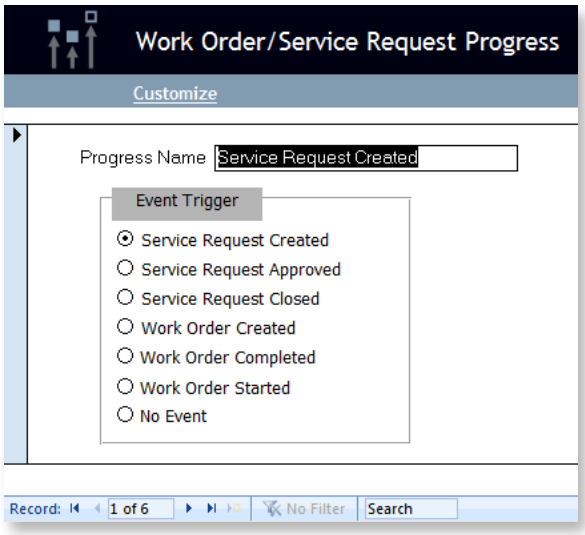
To print bar-coded part labels, go to the **Reports & Graphs** menu, select **Part Reports**, then select **Part Bar Code Label 1½ Inch**, **Part Bar Code Label 1 Inch** or **Part Bar Code Label ½ Inch**. Use the filter window to select parts by Part No., Model No., Category and Supplier. After you've selected the part(s), click **View** to see a print preview version of your label(s) or click **Print** to print them. Click **Clear Filter** to remove any filter information; click **Close** to return to the reports list.

Printing Tool Bar Code Labels

To print bar-coded tool labels, go to the **Reports & Graphs** menu, select **Tool Reports**, then select **Tool Bar Code Label 1½ Inch**, **Tool Bar Code Label 1 Inch** or **Tool Bar Code Label ½ Inch**. Use the filter window to select a specific tool or group of tools by Tool ID, Serial Number, Manufacturer, Type and Size. After you select the tool(s), click **View** to see a print preview version of your label(s) or click **Print** to print them. Click **Clear Filter** to remove any filter information; click **Close** to return to the reports list.

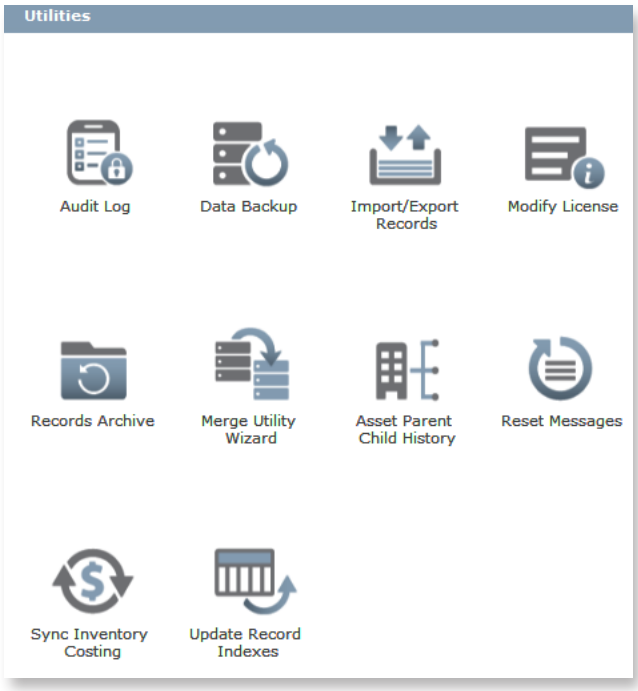
Work Order/Service Request Progress

In this window, you can create and edit the progress names that FaciliWorks displays in work order and service request **Progress** and **Status** fields. The **Progress Name** field shows the progress status (this is the value that can be customized); the radio buttons under **Event Trigger** indicate when FaciliWorks will automatically change the status of a service request or work order. Use the **Record Navigation** bar to move to the next record. Use the **Customize** button to modify the form labels and font weight.



Chapter Fourteen:
Utilities

Utilities are functions that are used to maintain your FaciliWorks database. Maintaining the audit log, data backup, importing/exporting records, archiving records and merging records are some of the functions that can be performed on the database. To access the **Utilities** menu, roll the mouse pointer over **Utilities and Data Tools** in the main menu and then click **Utilities**.



Audit Log

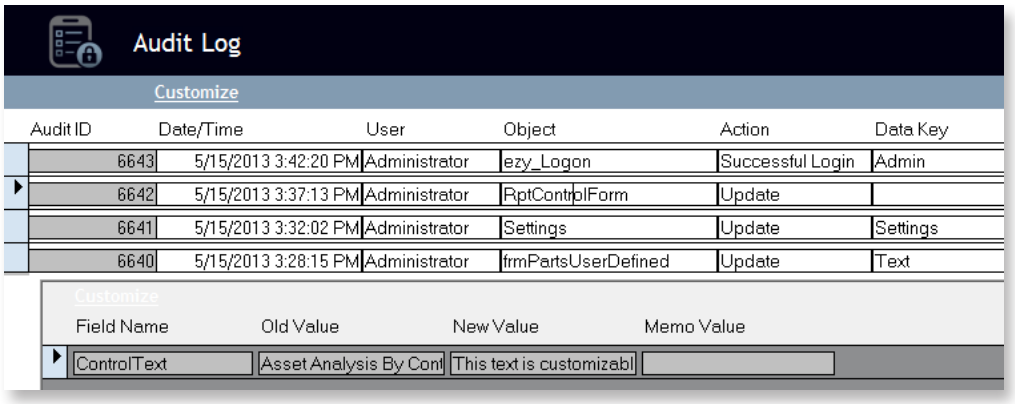
The FaciliWorks **Audit Trail** feature maintains a log of database usage such as record modifications and deletions, the name of the user who performed each action and the date and time when each action was performed. The **Audit Log** is a non-editable form. Records can be filtered using the **Records** tab on the ribbon and selecting either the **Quick Filter** or **Advanced Filter** from the **Filter** group.

To enable the **Audit Trail**, go to the **Setup -> Settings -> Security** tab. If you've installed the 21 CFR Part 11 compliant version of FaciliWorks, the **Advanced Audit Log** is automatically enabled and cannot be changed; records are never purged.

Remove Audit Trail Records after this many days: Enter the number of days of **Audit Trail** records to keep. FaciliWorks will automatically purge and delete actions older than this value. For example, enter 7 to keep a week of **Audit Trail** data. Enter 0 to keep a comprehensive audit trail record.

To see the **Audit Log**, select **Audit Log** from the **Utilities** menu.

The **Basic Audit Log** record displays all actions performed on the database including the date and time the action was executed and the user performing the action. The **Advanced Audit Log** displays basic audit information as well as the value of the modified field before and after the action. In the example below, click the row that shows the **Action** field as **Update** and the **Data Key** field as **Settings**. The **Advanced Audit Log** displays the old and new values of modified fields in the lower pane.



Data Backup

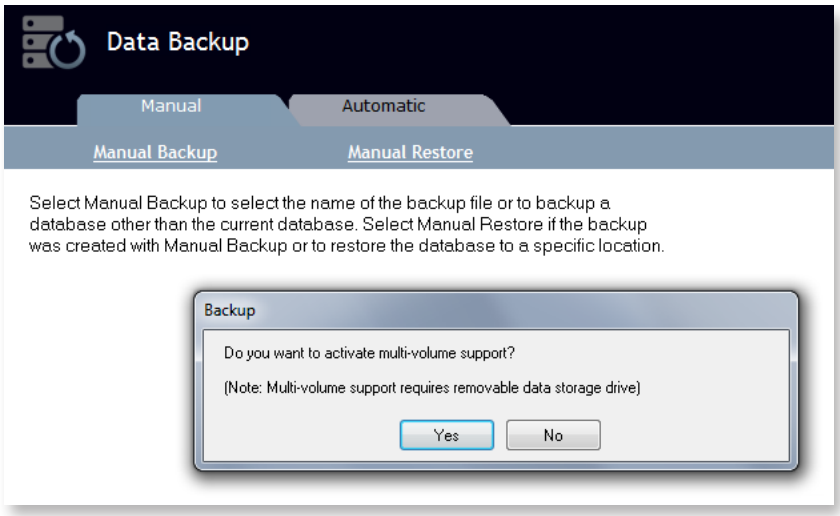
It is highly recommended that you periodically back up your FWDATA80.accdb database file (for best results, back up daily or weekly). To use the built-in backup feature, click **Data Backup** under the **Utilities** menu. FaciliWorks provides two methods to back up your data – automatic and manual. The **Data Backup** function can also be accessed via the **Office Button -> Data Backup**.

Data Backup – Manual Tab

Use the **Manual Backup** and **Manual Restore** options if you want a different name for your backup file or if you want to select a database other than the current one (the one shown in the bottom right corner of the application window).

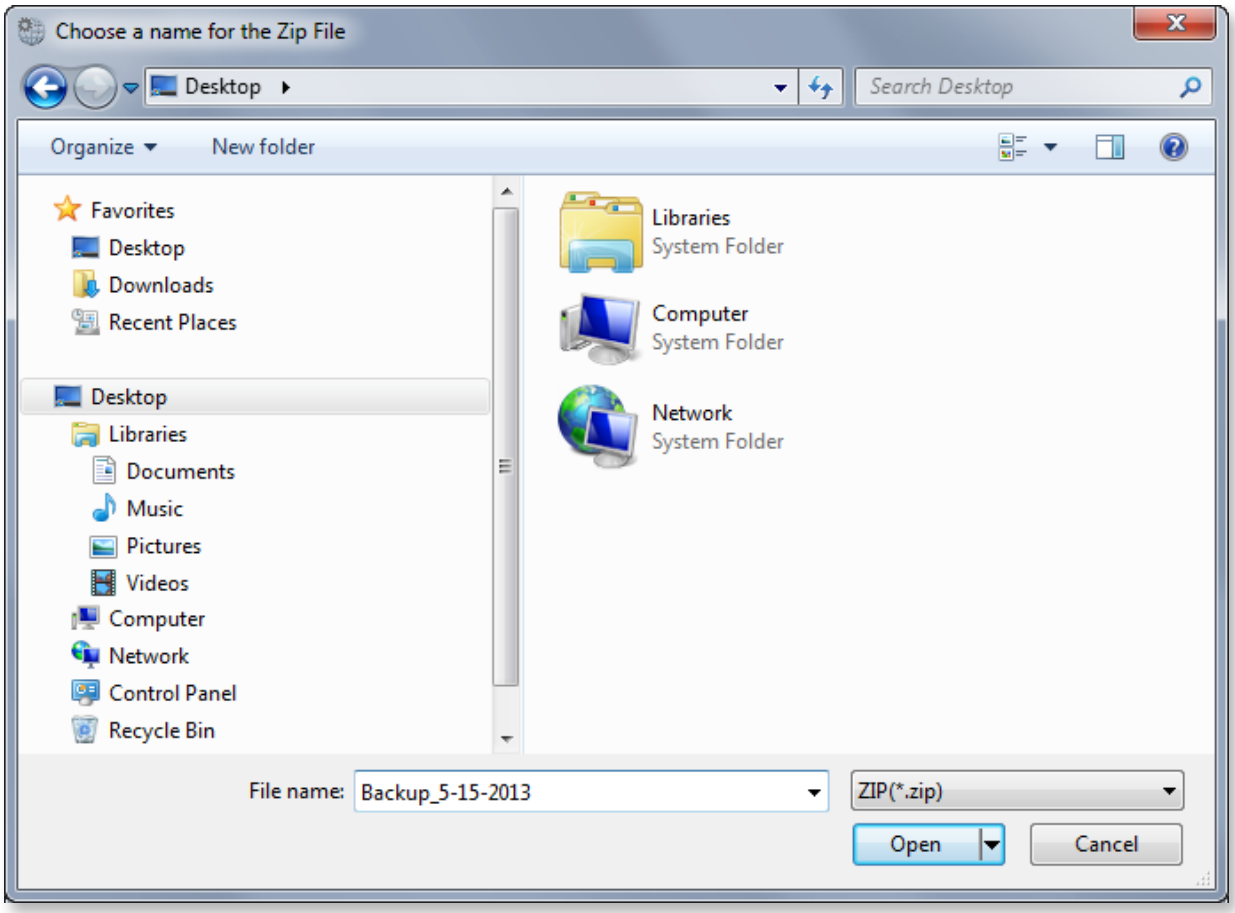
Manual Backup

In the **Manual** tab, click **Manual Backup**. The following dialog pop-up opens:

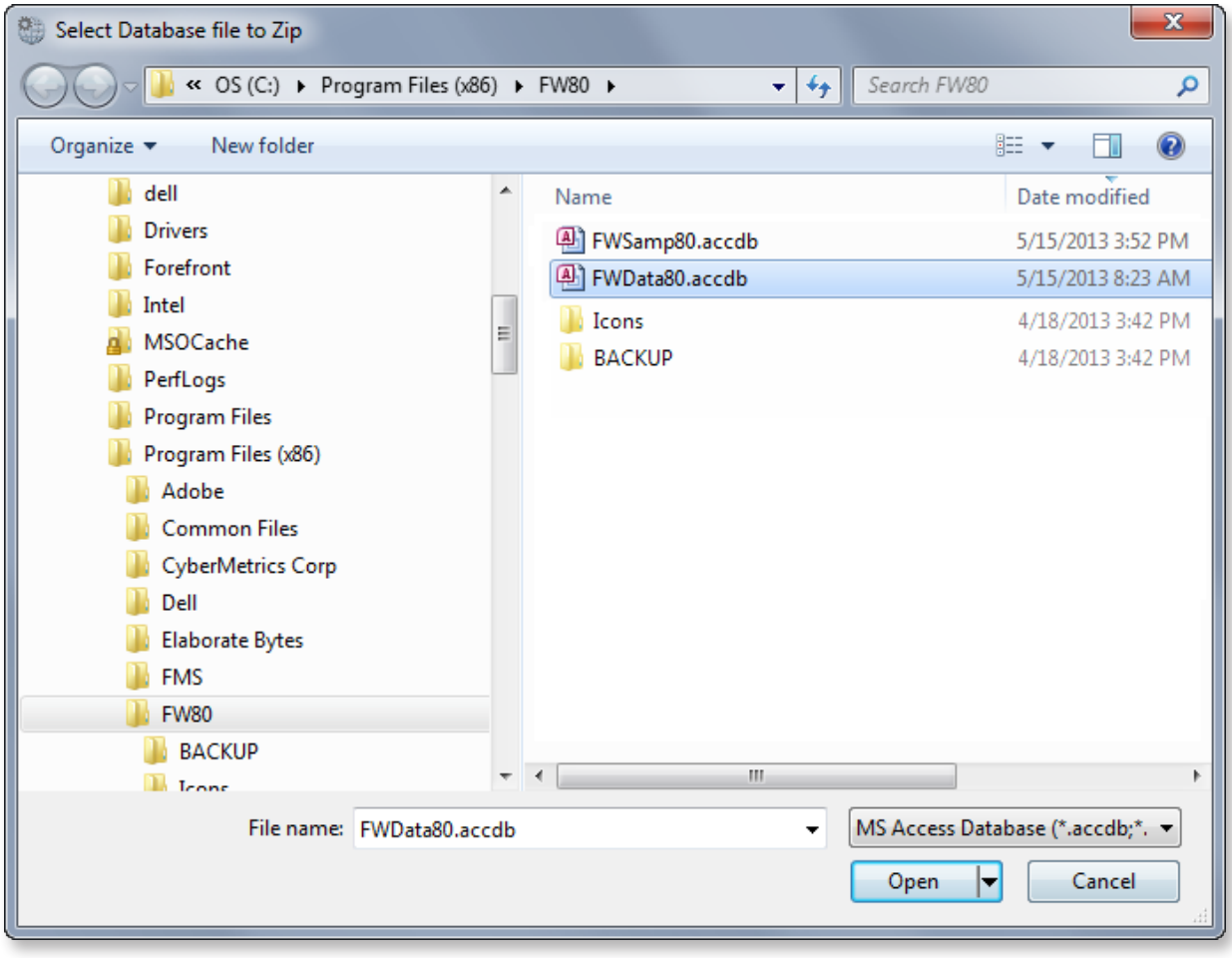

Data Backup
Manual
Automatic
Manual Backup
Manual Restore
Select Manual Backup to select the name of the backup file or to backup a database other than the current database. Select Manual Restore if the backup was created with Manual Backup or to restore the database to a specific location.
Backup
Do you want to activate multi-volume support?
(Note: Multi-volume support requires removable data storage drive)
Yes
No

Click **No**.

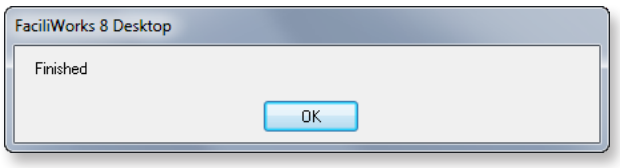
The next dialog box will ask you to enter a name for your Zip file. First, navigate to the location where you will create the file. In this example, navigate to the desktop. (Do not place the backup file on the same drive on which your database currently resides (C:\program files\fw80). Give your Zip file a name that will easily identify it when the backup is made; in the example below, the date is used in the **File Name**. Click **Open**.



The next dialog box prompts you to identify the database you want to back up. Navigate to and select your current database file and then click **Open**.



FaciliWorks will create the backup and notify you when it's finished. Click **OK** to return to the **Data Backup** form.



Navigate to the location of your database backup. Double-click the Zip file to open it. Your backup database is listed. You can now copy it to a CD or flash drive.

Manual Restore

Use **Manual Restore** if the backup was created with **Manual Backup** or to restore the database to a specific location.

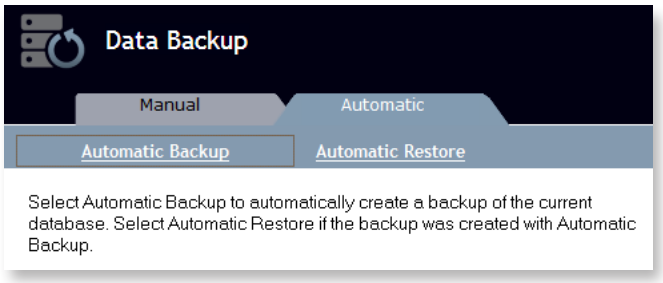
On the **Manual** tab, click **Manual Restore**. The next dialog box will ask you to enter the name of your Zip file. Navigate to the location of your database backup and select the Zip file. Click **OK**.

The **Browse for Folder** dialog window prompts you to select the folder in which the restored files will be placed. When you restore your database manually, you must either restore it to a location other than that of your current database or change its name. The **Manual Restore** utility has a built-in safeguard that will prevent you from overwriting your current database, even if you select the option to do so. This safeguard allows you to alternately open your restored and current databases to compare them if you suspect that you've lost data because of database corruption.

FaciliWorks will notify you when the backup has been restored to the selected location. Click **OK**. You can now connect to your database.

Data Backup – Automatic Tab

Use the **Automatic Backup** and **Automatic Restore** buttons to back up and restore your data using the default backup file name and location.


Data Backup
Manual
Automatic
Automatic Backup
Automatic Restore
Select Automatic Backup to automatically create a backup of the current database. Select Automatic Restore if the backup was created with Automatic Backup.

Automatic Backup

Click **Automatic Backup** to have FaciliWorks back up your current database. FaciliWorks will create a backup file that has the same name, but with an extension of .ZIP (for example, FWDATA80.ZIP).

The backup file is automatically placed in a directory that uses the date for its name (for example, if you did an Automatic Backup on April 28, 2011, the directory name would be 28042011). A text file called AUTOZIP.TXT will also be created.

Important: Do not make any changes to the text file (AUTOZIP.TXT)!

FaciliWorks tells you when your data is successfully backed up.

Automatic Restore

To use **Automatic Restore**, you must use **Automatic Backup** to back up your data. When you click **Automatic Restore**, FaciliWorks tries to put the database back in the same place from which you backed it up. If a database file with that name already exists in that location, FaciliWorks tries to put the database back into its original folder, in the subdirectory BACKUP.

For example, if you originally backed up FWDATA80.ACCDB and it was located on C:\PROGRAM FILES\FW80\FWDATA80.ACCDB, FaciliWorks will try to restore it to C:\PROGRAM FILES\FW80\. However, if another FWDATA80.ACCDB file already exists in C:\PROGRAM FILES\FW80\, FaciliWorks will place the restored file into C:\PROGRAM FILES\FW80\BACKUP\. If a database file with the same name exists in this directory as well, FaciliWorks will tell you that the file already exists and that you need to use **Manual Restore** to restore the file to a different location.

FaciliWorks will tell you when the database has been successfully restored and then it will close the **Backup/Restore** screen and ask you if you want to attach to the database that you just extracted.

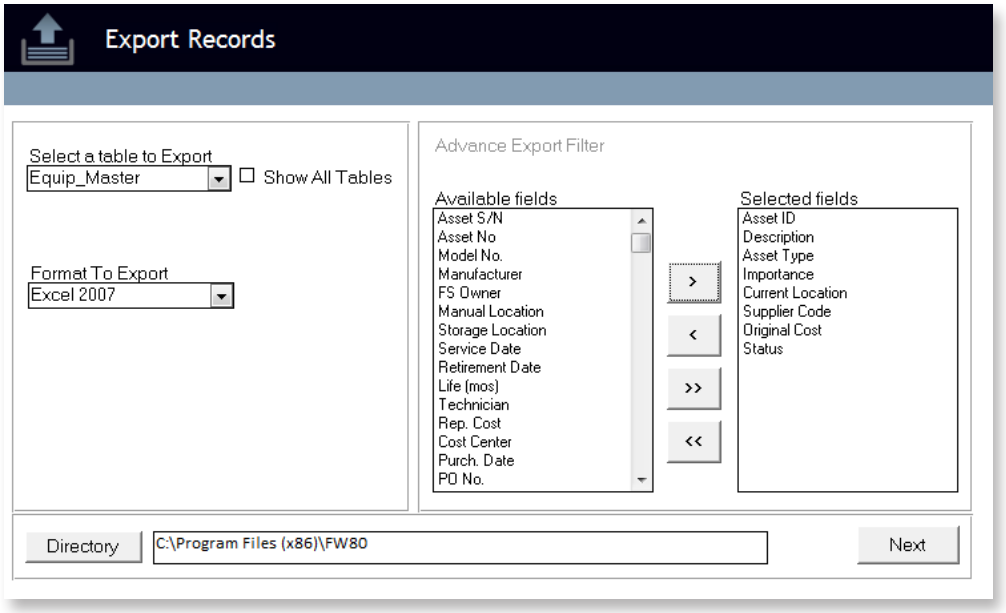
Import/Export Records

Use the **Import/Export** utility to move data records to and from your database or to populate your database with records from an Excel spreadsheet. From the Main Menu, navigate to **Utilities -> Import/Export Records** button.

Exporting Records

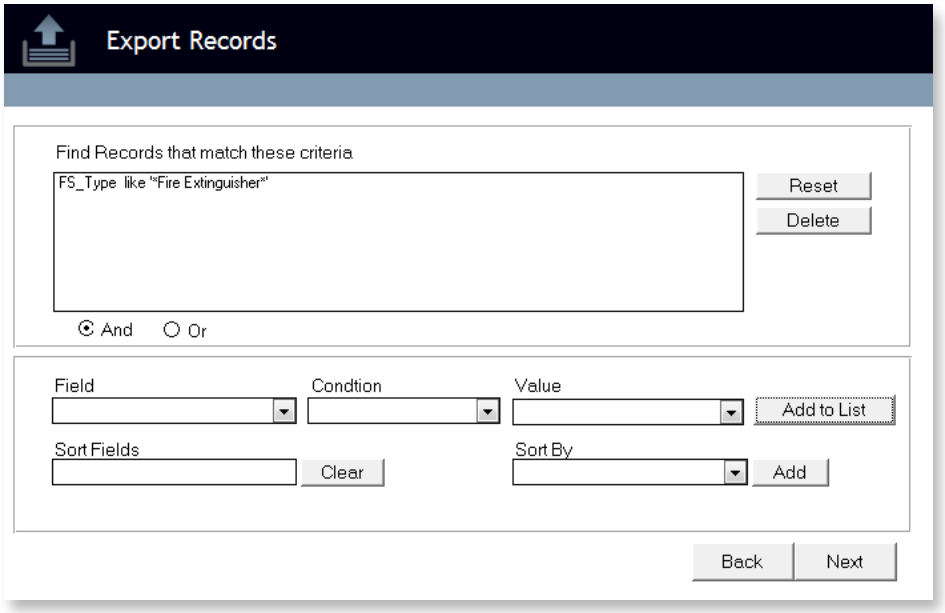
Click the **Export Records** button. Use the drop-down list in the **Select a table to Export** field to select a table. The tables in the default menu are the major entry tables. To display all database tables, check the **Show All Tables** box before using the drop-down list. In the **Advanced Export Filter** pane, select the fields from the table that you want to export: click the field in the **Available Fields** list and then click the **[>]** button. Click the **[>>]** button to select all fields. To remove one or all fields from the **Selected Fields** list, click the **[<]** or **[<<]** buttons, respectively.

Next, select the format of the resulting file using the **Format to Export** drop-down list.



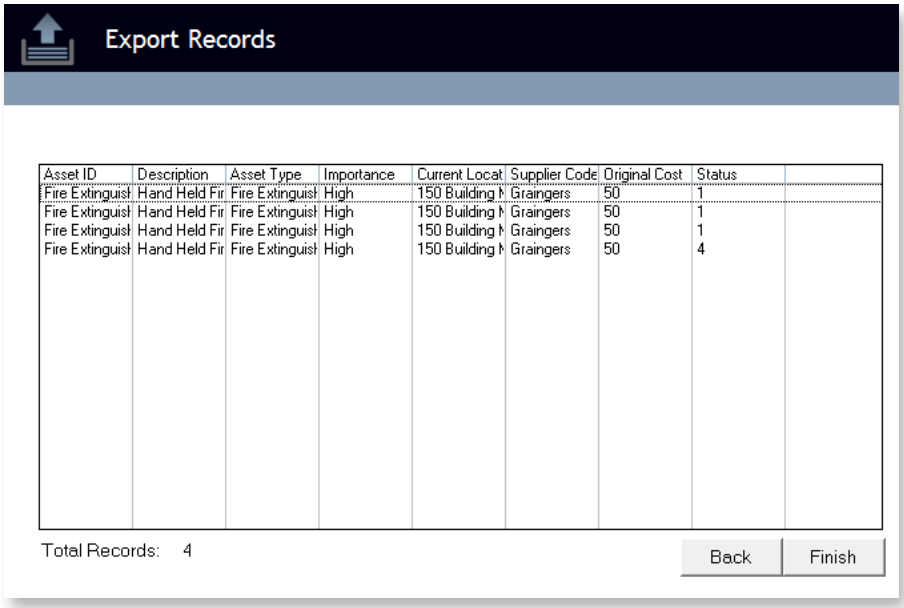
The **Directory** button allows you to navigate to the database in which the records reside; the default is the location of the active database. Click **Next**; you are presented with a filter window.

This advanced filter allows you to limit the records that will be exported. The result can be very specific (one type of asset) or very general (all records). Select the **Field**, **Condition** and **Value** criteria using the drop-down lists, then click **Add to List** to place the criteria in the criteria box. FaciliWorks is creating a query on the database using the information in the criteria box. You can add one or more criterion to create the query using the **And** or **Or** radio buttons. The **Sort By** field will specify the order of the resulting records in the file. To include all records, leave all fields in the filter blank.

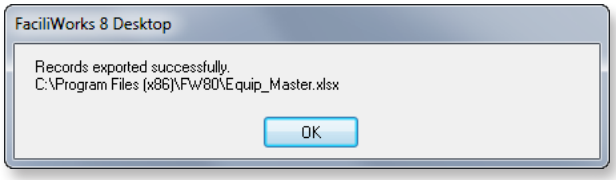


Click the **Reset** button to clear the criteria box and create a new query. Select a criterion and then click the **Delete** button to remove the criterion from the query. Click **Next** when you have completed defining the query.

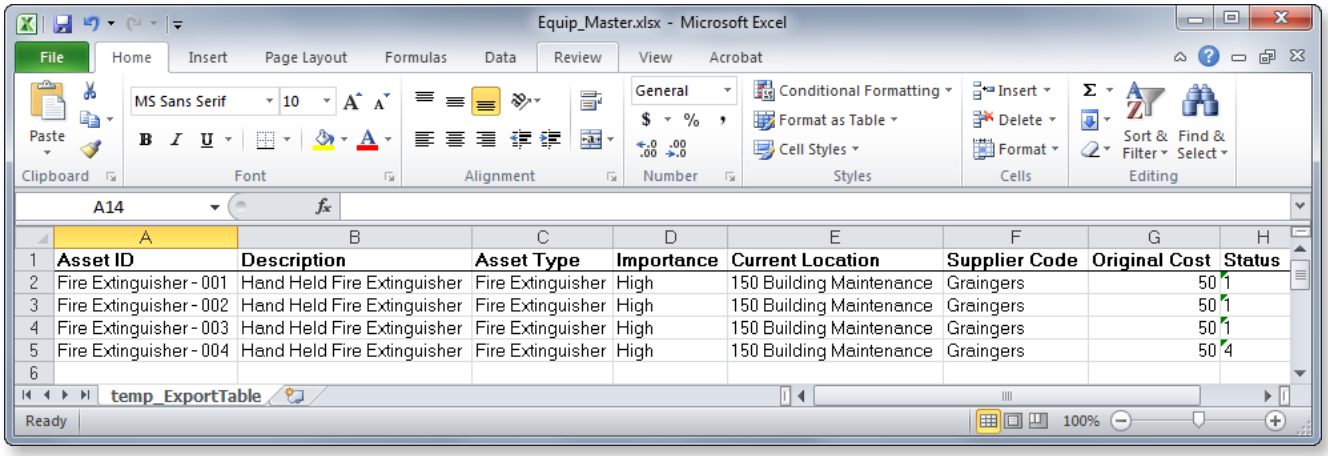
The selected records are displayed next:



Click **Finish** to complete the export process. FaciliWorks notifies you that the records were exported successfully and displays the path to the file that was created:



Click **OK**. Close the **Import/Export** utility and navigate to the file:



	A	B	C	D	E	F	G	H
1	Asset ID	Description	Asset Type	Importance	Current Location	Supplier Code	Original Cost	Status
2	Fire Extinguisher - 001	Hand Held Fire Extinguisher	Fire Extinguisher	High	150 Building Maintenance	Graingers	50	1
3	Fire Extinguisher - 002	Hand Held Fire Extinguisher	Fire Extinguisher	High	150 Building Maintenance	Graingers	50	1
4	Fire Extinguisher - 003	Hand Held Fire Extinguisher	Fire Extinguisher	High	150 Building Maintenance	Graingers	50	1
5	Fire Extinguisher - 004	Hand Held Fire Extinguisher	Fire Extinguisher	High	150 Building Maintenance	Graingers	50	4
6								

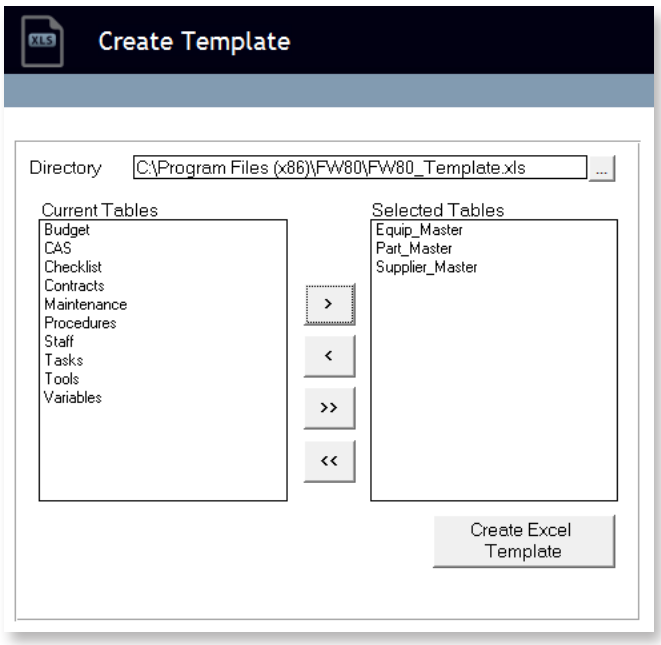
Importing Records

When importing records into the FaciliWorks database, it is crucial to follow the same format as the database; use the same data types and order of the fields. An Excel template is provided to ensure that the proper format is followed to successfully import your records. First, export the template, populate it with your data and import the template back into your database.

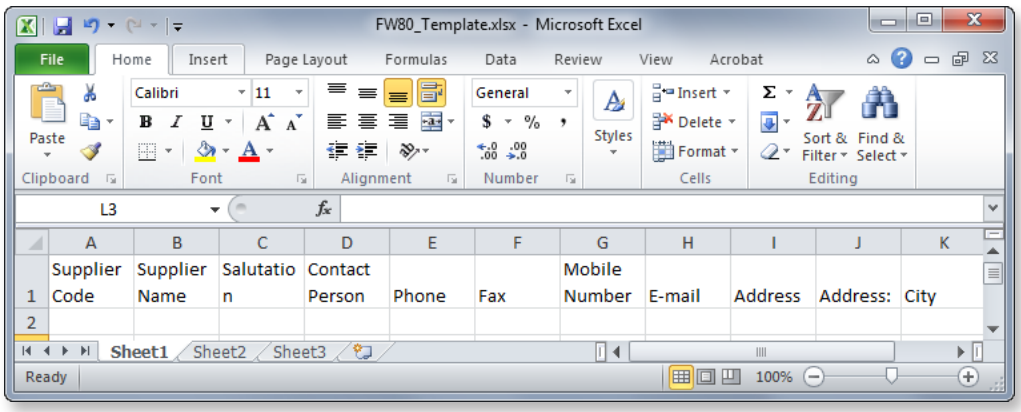
From the **Utilities** menu, click **Import/Export Records** and then select **Create Excel Template**:

Only one template can be created at a time; however, the Excel workbook may have many sheets – one for each table. This makes it both easy and efficient to populate your tables; one at a time or all at once.

The **Directory** field displays the location of the template; it defaults to the location of the current database. Select each **Current Table** to export and then click the **[>]** button. Click the **[>>]** button to select all tables. To remove one or all tables from the **Selected Tables** list, click the **[<]** or **[<<]** buttons respectively.



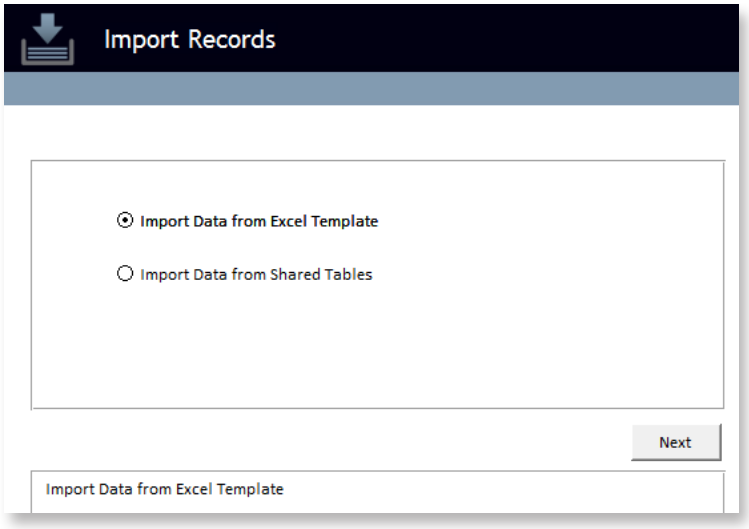
Click **Create Excel Template**. You'll receive a message that the template was successfully created. Click **OK** on the message and then navigate to the location of the file.



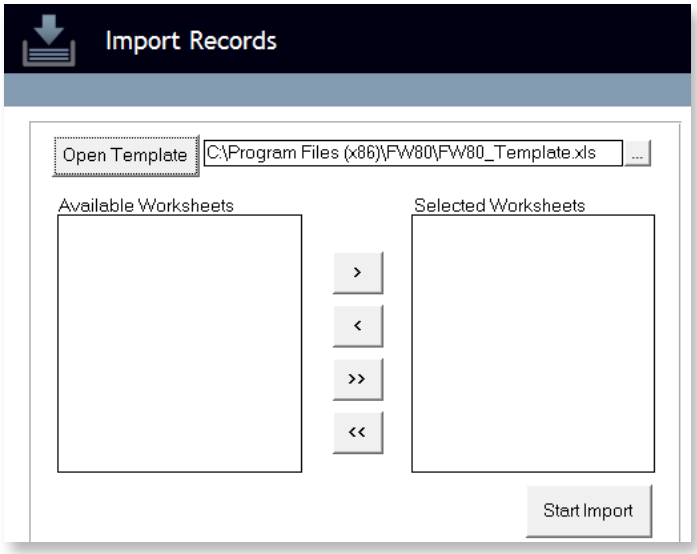
Records can now be added to the template. Resist the temptation to resize the columns or change any formatting of the template; this will prevent the records from being imported correctly. Data can be copied from another spreadsheet and inserted into the template; copy one column at a time, adding pertinent data and leaving other columns blank where appropriate. If you insert a record that contains a duplicate **Key Field** already in the database, that record will not be imported as it will violate the rules of unique **Key Fields**.

Notice that the template contains a separate worksheet for each table. Navigate to each worksheet to insert your data. When all data is entered, save and close the template.

The template can now be imported into the database. From the **Import/Export Records** menu, click **Import Records**. Select the **Import Data from Excel Template** radio button and then click **Next**.



Navigate to the template file using the **[...]** button to the right of the navigation text box.



Click **Open Template** to display available worksheet(s). Select the worksheet(s) to import into the database and then click the **[>]** button. Click the **[>>]** button to select all worksheets. Click **Start Import**.

The total number of records imported is displayed in an **Import Summary** window. Click **OK** to close the window.

Import Data from Shared Tables

The **Import Data from Shared Tables** function is only to be used at the advice of FaciliWorks Technical Support. The purpose is to import select tables from an entire database as opposed to transferring a database in its entirety. Please call Technical Support at 1-800-776-3090 for instruction.

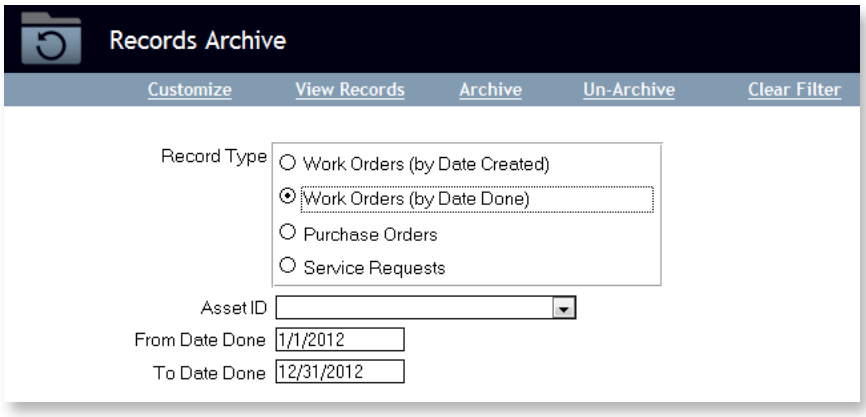
Modify License

Modify License (accessed via the **Utilities** menu) is used only when the 30-day FaciliWorks evaluation period is about to expire, to provide a way for you to continue your license. Seven days before your evaluation period is over, FaciliWorks will display a message that this period is about to expire. For your convenience, this period will not expire on a Saturday or a Sunday. To continue your license, call CyberMetrics Technical Support at 1-800-776-3090 for instructions.

Records Archive

This utility allows you to archive or un-archive your completed work orders, purchase orders and service requests according to date. Archiving will move your records from the current group of records and place them in a storage location within the database. This makes your current group of records smaller, so your database will run more efficiently. An archive is not the same as a backup; a backup preserves your entire database in a separate place and can be restored if your database is lost or damaged. Archived records are not accessible through forms or filters. The **Records Archive** function can be accessed via **Utilities -> Records Archive** or via the **Office Button -> Records Archive**.

Important: Always make a backup copy of your FWDATA80.ACCDB file before you archive records!



To archive your records, first select the **Record Type** by clicking the appropriate radio button. Two options for work orders are provided: filter by **Date Created** or by **Date Done**. Next, if you want to find records that pertain to a particular asset, enter or select the **Asset ID**. Then, enter a date range for records you want to archive. Next, click the **Archive** button to archive the selected records.

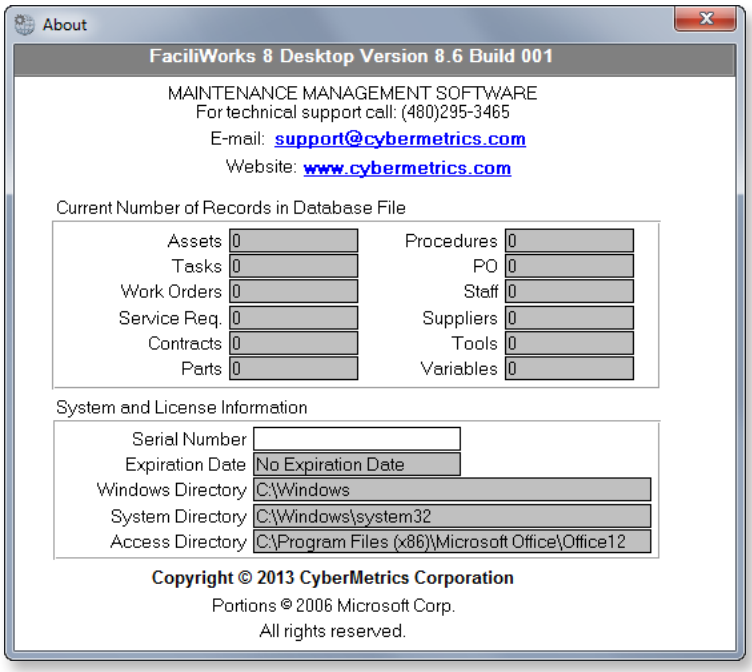
Click **OK** to close this message. Click the **View Records** button to view the corresponding records. To re-filter, click the **Clear Filter** button. To un-archive records, enter the appropriate information in the filter fields and then click the **Un-Archive** button. Use the **Customize** button to modify the form labels and font weight of any form labels. Close the form to return to the **Utilities** menu.

Merge Utility Wizard

Accessible via the **Utilities** menu, the **Merge Utility Wizard** allows you to merge data from another FaciliWorks database into your current database. A single record or multiple records can be merged. Navigate to **Utilities and Data Tools -> Utilities -> Merge Utility Wizard**. In our example, we will merge FWSamp80.accdb (Source Database) with FWData80.accdb (Destination Database). FWSamp80.accdb contains the sample data that ships with the FaciliWorks software. FWData80.accdb contains no records. We will merge all records from FWSamp80.mdb into FWData80.accdb.

Important: Make a copy of the blank database and give it a different name before merging the blank database with the sample database. See **Creating a New Data File** for instructions.

Before merging the two databases, verify that you are connected to the FWData80.accdb database and that it contains no data. From the Main Menu, select the **Help** tab on the ribbon and then select **About**. The center section of the display will show the current number of records in the database:



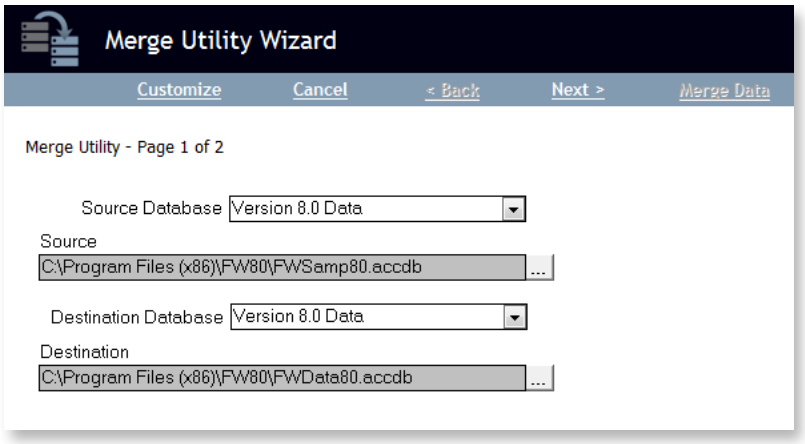
Currently, there are no records in the FWData80.accdb database. Close the **About** form to return to the Main Menu.

The **Merge Utility Wizard** window is displayed (Page 1 of 2). Open the **Source Database** drop-down list and select **Version 8.0 Data**. Next, click the browse button [...] at the right side of the **Source** field and the **Open Database** window opens. Click **Browse**.

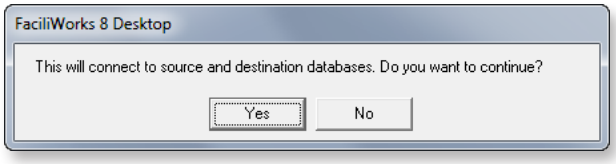
In the **Where is the Data File** window, navigate to FWSamp80.accdb in the FW80 folder. Click **Open**. This will return you to the **Open Database** window; the path C:\Program Files (x86)\FW80\FWSamp80.accdb is displayed in the **Database** field. Click the **Test** button; database connection is successful. Click **OK** on the message and then click **OK** in the **Open Database** window to return to the **Merge Utility Wizard**.

The **Destination Database** field should automatically display Version 8.0 Data; if not, select it from the drop-down list. Click the browse button **[...]** to the right of the **Destination** field. Click **Browse**.

In the **Where is the Data File** window, navigate to FWData80.accdb in the FW80 folder. Click **Open**. This will return you to the **Open Database** window; the path C:\Program Files (x86)\FW80\FWData80.accdb is displayed in the **Database** field. Click the **Test** button; database connection is successful. Click **OK** on the message and then click **OK** in the **Open Database** window to return to the **Merge Utility Wizard**.

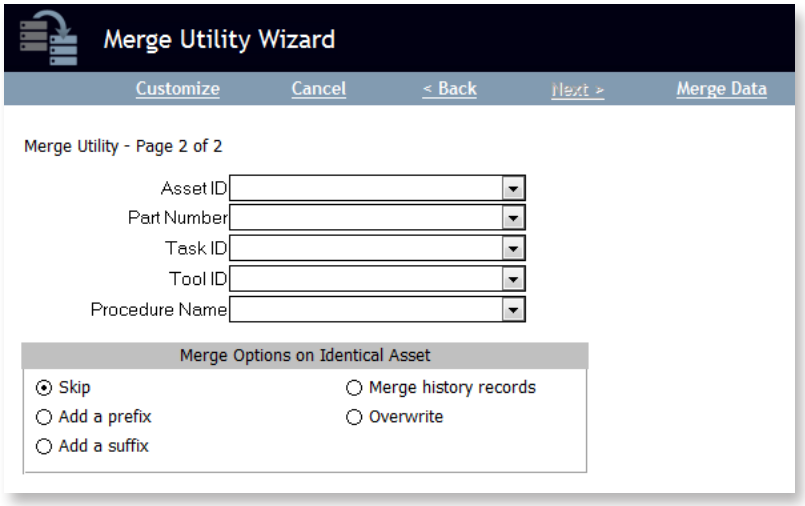


Click **Next**. This will connect to the **Source** and **Destination** databases:



Click **Yes** to continue.

On Page 2 of the **Merge Utility Wizard**, specify the data that will be merged into the blank database. In the upper section of the filter, use the drop-down lists to locate and select specific records. To merge all data, leave all fields blank. The lower section of the **Merge Utility Wizard** window contains options for how to proceed if there are identical asset records in both databases.



Skip: Ignore identical records.

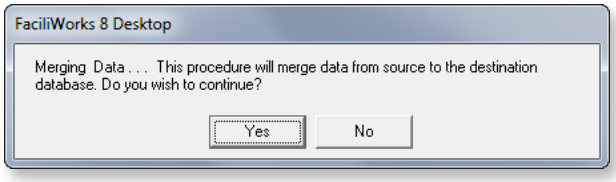
Add a Prefix: Place additional characters at the beginning of the record.

Add a Suffix: Place additional characters at the end of the record.

Merge history records: Merge historical data from newly merged records into the corresponding records in your original database.

Overwrite: Replace your original records with the corresponding records in the newly merged database.

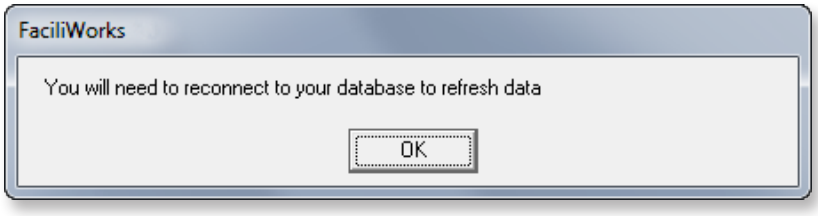
When you are ready to proceed, click **Merge Data**.


FaciliWorks 8 Desktop
Merging Data . . . This procedure will merge data from source to the destination database. Do you wish to continue?
Yes
No

Click **Yes** to continue.

Click **OK**.

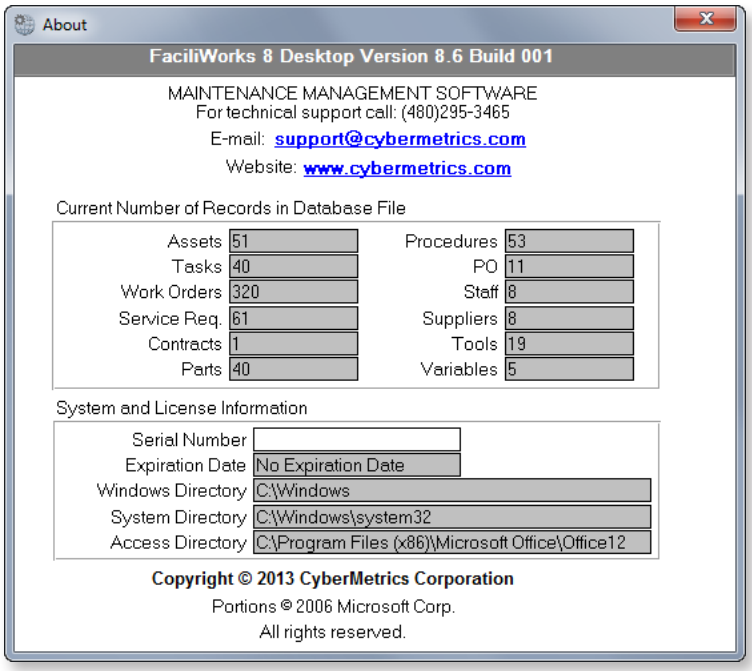
Click **Close** in the Ribbon to close the **Merge Utility Wizard**; the following message will open:



Click **OK**.

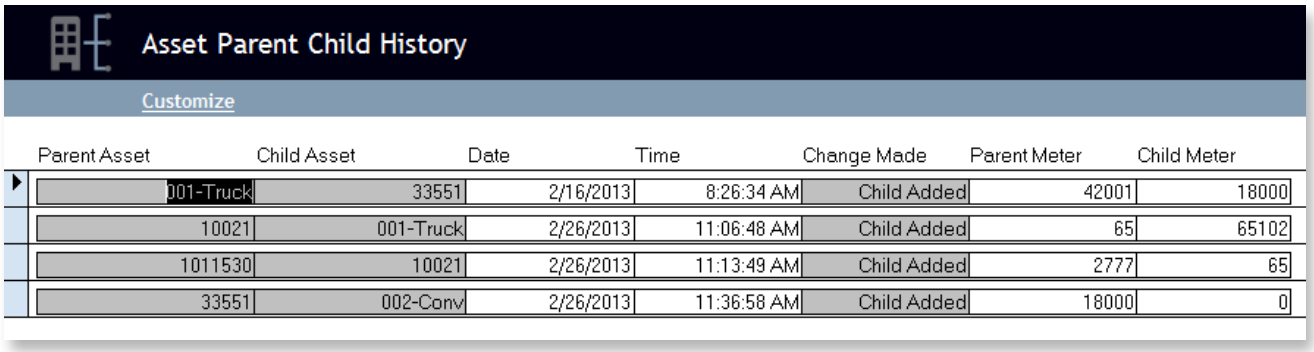
You may receive a prompt about making sure no one else is connected to the database; if so, click **Yes** to continue.

This will return you to the **Open Database** window; the path C:\Program Files\FW80\FWData80.accdb is displayed in the **Database** field. Click the **Test** button; database connection is successful. Click **OK**. FaciliWorks will refresh the database. Click the **Help** tab and then click the **About** button on the ribbon. The **Current Number of Records in Database File** section reflects the new records in the previously blank database; the window will look similar to the following:



Asset Parent Child History

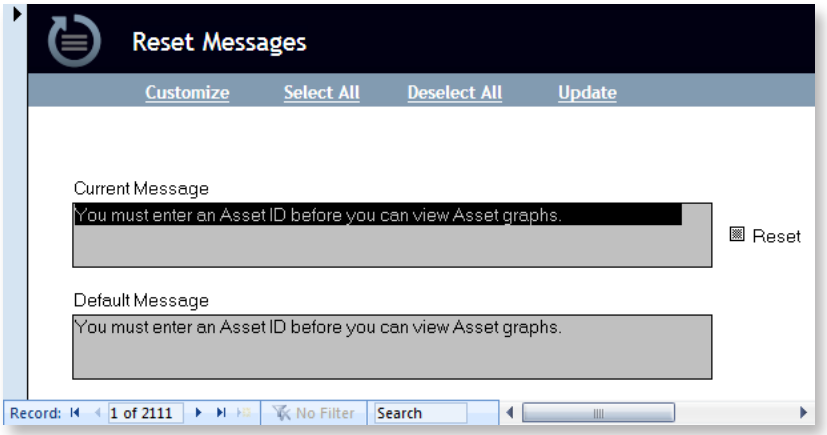
This utility displays a comprehensive history of the parent-child relationships of the assets in a database. Each record lists the respective **Asset IDs** for both parent and child assets, the date and time a change was made to the child asset status, whether the child asset was added or removed and the respective meter readings for both parent and child assets. This history coincides with the **Asset Tree View** created on the **Assets -> Components** tab.



Parent Asset	Child Asset	Date	Time	Change Made	Parent Meter	Child Meter
001-Truck	33551	2/16/2013	8:26:34 AM	Child Added	42001	18000
10021	001-Truck	2/26/2013	11:06:48 AM	Child Added	65	65102
1011530	10021	2/26/2013	11:13:49 AM	Child Added	2777	65
33551	002-Conv	2/26/2013	11:36:58 AM	Child Added	18000	0

Reset Messages

This utility allows you to restore the original text of any message in FaciliWorks. FaciliWorks displays the current text of the message in the upper text box of this window and the default text in the lower text box. Use the record navigation bar to move through the various records. To restore messages to their default text, check the **Reset** checkbox next to the messages you want to restore and then click **Update**. Click the **Select All** button to check the **Reset** checkboxes for all messages; click **Deselect All** to uncheck all checkboxes. Use the **Customize** button to modify the form labels and font weight of any form labels.



Sync Inventory Costing

This function updates the part costing records for your inventory when the total of the part costing records does not match the value in **Quantity in Stock**. Before running this function, make sure that the value in **Quantity in Stock** is the correct value for all parts in the database. The value in **Cost from Mfg** will be used as the part costing value.

Update Record Indexes

The Access database uses indexes in a table to find data quickly, much the same way indexes are used in a book; Access looks up the location of the data in the index. In some instances, such as for a Primary Key, Access automatically creates an index for you. If you are making changes to your Primary Key fields, deleting records and/or adding records on a regular basis, you will need to update the record indexes periodically to keep the database running efficiently. Simply click **Update Record Indexes** from the **Utilities** menu. FaciliWorks will automatically update the index and notify you upon completion.

Chapter Fifteen:
Data Tools

The **Data Tools** menu contains utilities that are intended for one-time use. Use these features only when instructed to do so by Technical Support or FaciliWorks documentation (such as update notices).

Calculate Due Dates and Meters

This utility recalculates all maintenance due dates. For example, if you change the maintenance frequency for punch presses from 60 days to 90 days, and you have 25 punch press records, it would be more efficient to update the due dates by running this utility than to manually click the **Calculate** buttons in the Assets form for all 25 records.

This utility uses the **Last Maintenance Date** and the **Maintenance Frequency** to calculate the **Next Date Due**. It will leave the **Next Date Due** field blank for any records that are meter-based.

Fill Maintenance Dates

Use the **Fill Maintenance Dates** utility to fill maintenance records with information from the date field in **Work Order Entry**. The work order dates will be filled in only if they are currently blank. Emergency work orders will be filled in with the date the work order was created. Non-emergency work orders will be filled in with a date one week after the work order was created.

Fill Part and Tool Use

Each part and tool record contains a **Where Used** form. In this form, you can see a list of assets that contain work orders that used this particular part or tool. You can fill in the information in this screen yourself or you can click on the **Fill from Work Orders** button (or **Fill from Work** button) in each record to complete the information for that individual record. However, you can also use the **Fill Part and Tool Use** utility to fill in all of your part and tool records with the **Where Used** information from all non-archived, completed work orders.

Find Uncodeable Records

In FaciliWorks, you can print bar codes for parts, tools, employees and assets. Run the **Find Uncodeable Records** utility to check all of your **Part Numbers**, **Tool IDs**, **Employee IDs** and **Asset IDs** to determine if any of them contain characters that cannot be converted into bar codes. If no uncodeable records are found, a dialog box will confirm this. If the utility does find any uncodeable records, it will list them and let you to print a report of them; navigate to each record to correct errors.

Remove Spaces

It is highly recommended that this utility is run after you import data from another program. This feature removes unnecessary trailing spaces that may have been used by your old program and were then imported into FaciliWorks.

Note: This utility is not the same as the utility executed by **Compact/Repair Database**. The **Compact/Repair Database** function does not remove any spaces; instead, it removes old, deleted records that are no longer needed.

Repair Work Order Dates

This utility checks all of your work order records for valid dates and times. If a record is missing one of these values, the program will insert the required information.

Reset Open Tasks

Use this utility to update the **Open Work Order** checkbox in all of your asset records (**Assets -> Task List -> Task** sub-tab.

Compact/Repair Database

Whenever you delete a record, the record is not truly removed from the database – it's just marked as deleted and the location it occupies is reused whenever you add new records (that is, the data file size does not decrease). If you delete many records, you may want to compact your data file so that all the records marked as deleted are actually deleted and the data file is reduced in size. You can do this by selecting **Compact/Repair Database** from the **Data Tools** menu. If necessary, this utility will also repair the database before compacting it.

Although FaciliWorks has been designed to be as trouble-free as possible, there are occasions when error messages may appear because of power outages, accidental resetting of your computer, network disconnects and other mishaps. In these cases, you may need to repair and compact your data file. You can do this by selecting **Compact Repair Database** from the **Data Tools** menu. If you use multiple databases, you must compact each database individually. Depending on the size of your file, this utility may take several minutes to complete the process.

Reset Tools Issue Status

This utility corrects problems with imported records showing that a tool has been received even though it has not been issued. Do not run this tool unless instructed to do so by Technical Support.

Chapter Sixteen:
Data Files and System Maintenance

Creating a New Data File

FaciliWorks includes an empty database, identical in structure to the sample database, to allow you to use multiple asset databases. You can copy the empty FaciliWorks database file and give it a different name. The settings and users that you entered for your current database will be copied to your new database.

Before you create a new data file, you may want to create a new directory in which to store your new database file. Use Windows Explorer to create the new directory. You can name your directory to identify which database file it contains (such as PLANT5, STAMPING, REFRIG) or by the name of a customer or an asset supplier. For example, your directory name could be a plant location. Your database file paths would look like this:

C:\PROGRAM FILES\FW80\CHICAGO\ FWDATA80.ACCDB

C:\PROGRAM FILES\FW80\MIAMI\ FWDATA80.ACCDB

C:\PROGRAM FILES\FW80\SEATTLE\ FWDATA80.ACCDB

After you have created your new database, open FaciliWorks, stay in the Main Menu, then select **File -> Open Database**. Use the **Browse** button to navigate to your new directory which contains the second database file and then click **Open**. In the **Open Database** window, click **Test**; the connection is successful. Click **OK** to close the message and back in the **Open Database** window, click **OK**.

The current database file is displayed in the lower right corner of the application window. FaciliWorks will remember which database file you last opened, even if you exit the program and launch it later. To open and use your original database file, go to **Open Database** again and navigate back to your original directory (typically C:\PROGRAM FILES\FW80).

Date Formats

FaciliWorks supports all available numeric date formats within Windows. For example, you can represent the date of November 1, 2002 as 11/1/2002, 2002/1/11 or 2002/11/1, depending on your preference. You may want to verify your date settings in the Windows Control Panel. Choose Start -> Control Panel, then open Regional and Language Options and click the Regional Options tab. The date formats that you enter into FaciliWorks must match the Windows international date setting; otherwise, errors will occur while you're running the program.

Maintaining Your Hard Drive

Windows includes two utilities to keep your hard disk running smoothly. Run Disk Cleanup each week to cleanup cross-linked files and other problems. Next, run Disk Defragmenter to defragment your files (this keeps your files from being spread out in pieces over the hard drive). Your disk accesses will run somewhat faster and your hard drive will be less prone to problems.

To run either of these programs, close all of your open applications. Then, from Windows Start button, select All Programs. Choose Accessories and then select System Tools. Next, select either Disk Cleanup or Disk Defragmenter.

Maximizing the Performance of FaciliWorks

If you have limited resources and FaciliWorks runs slowly, try closing all other applications to devote all of your available system resources to FaciliWorks.

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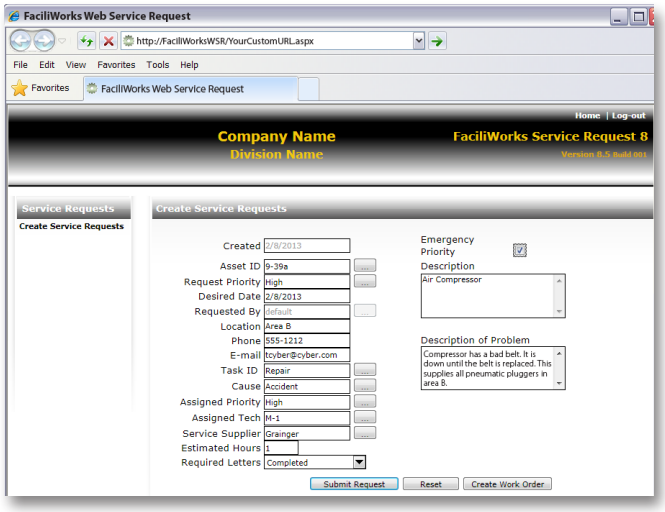
FaciliWorks® Desktop Product Options

Web Service Requests

The seamless, fast and secure FaciliWorks Web Service Request module allows users in various locations to quickly and easily create and submit service requests over the Internet and automatically routes them to a central maintenance department, eliminating time-consuming phone calls and written requests while providing centralized documentation of every service request and its outcome.

- Seamless integration with FaciliWorks
- Unlimited concurrent users
- Quick and easy - no training needed
- Secure and password protected



The request is automatically routed to FaciliWorks; it can then be viewed by the maintenance manager who can delete the request or approve it and convert it into a work order. FaciliWorks can be configured to send automatic email notifications at each step of the process, informing the original requestor and need-to-know personnel of the progress of the request and the maintenance manager can monitor the status of the requests and work orders from the FaciliWorks Dashboard.

Total Maintenance Solution (TMS)

The FaciliWorks Total Maintenance Solution includes all the tools you need to automate your maintenance department at a special package price. FaciliWorks TMS includes:

- FaciliWorks Desktop CMMS Software
- Maintenance Label Kit
- SafetyPro

Maintenance Label Kit

Print durable, laminated, bar-coded labels directly from FaciliWorks.
The small-footprint Brother printer comes with cables, design software and everything else you'll need to get started.

TaskPro and SafetyPro

TaskPro is a fully customizable, comprehensive database of maintenance procedures covering 250 different topics related to facility and equipment maintenance and easily installs directly into your FaciliWorks database.

SafetyPro is a database of step-by-step safety checklists to assist with OSHA compliance. It covers 40 different topics including fire protection, stairs and stairways, hand tools and just about anything else you might need.

Training

Anyone involved in the implementation or daily use of FaciliWorks will benefit from the array of training options we offer: web training, regional classes and onsite training. You'll learn how to save time, avoid common mistakes and get the most out of your software. You'll also learn about advanced topics such as data administration, asset management, spare parts inventory management, managing purchase orders, creating preventative maintenance schedules, unscheduled work orders, system security and more.

Contact us today to learn how these products and services will further maximize your productivity with FaciliWorks.

FaciliWorks®
Making Maintenance Manageable

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